SPOT

User Guide

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Built from the ground up, SPOT employs standards-based architecture utilizing Microsoft® Windows®, Microsoft® SQL Server®, Microsoft® Terminal Services, and Citrix® multi-user software with hosting capabilities. SPOT directly interfaces to other award-winning industry software such as Microsoft Word® and Excel®. Extensive scalability testing by an independent world-class agency is further assurance of product quality, performance, and reliability.

About This Guide

SPOT, like other sophisticated software designed for complex business operations, requires a high degree of knowledge to effectively configure and use. **SPOT is not do-it-yourself software!** We recommend installation and training be performed by a qualified SPOT professional. As such, this guide is not intended to be an authoritative guide to the complete use and operation of SPOT. You may need our assistance with setup, training, and custom configuration. SPOT Business Systems offers several assistance plans. If you attempt installation or training yourself and need additional assistance, purchasing one of our assistance plans is required.

Resources

SPOT Business Systems provides the following documentation resources for use with SPOT. References in this document to "User-Defined" or "Configuration" options are found in the Operations Guide. Most of the documents list below are updated regularly and can be accessed in PDF format from our Web Site at www.SPOTpos.com by selecting Customer Care > Documentation Library.

- **Installation Guide**—Contains software installation instructions.
- **Quick Start Guide**—Quick reference guide for clerks.
- **User Guide**—Complete user manual for owners.
- **Operations Guide**—Discusses use and configuration by function.
- **Media Guide CDROM**—Narrated sales and training guide.
- **Policies, Procedures, Requirements & Owners Resource Guide**—An informational resource designed to answer questions about software, systems, and services before and after SPOT software or system purchase.

Conventions

SPOT generally conforms to Windows user interface and design conventions. Departure from standard Windows conventions is the result of our efforts to create an effective touch screen user interface. Observe the following when reading the document and using SPOT.

ABBREVIATIONS

Throughout this document, references to some screen views have been shortened for the sake of brevity. These views are described later.

- **A/R**—Accounts Receivable
- **CC**—Credit Card
- **CCOF**—Credit Card On File
- **CV**—Customer View
- **CL**—Customer Lookup
- **HP**—Home Page
- **PIN**—Personal Identification Number
- **VI**—Visual Invoice

SCREEN DESIGN

In SPOT all major functions occupy the entire screen with exceptions appearing as dialogs.

- **View**—Fills the major portion of the screen and contains most of the display and functionality selections needed.
- **Dialog**—A smaller pop-up window that appears over a View. Dialogs are active while displayed, disappearing when utilized.
- **Tab**—Provide multiple selection area within a View or Dialog.

BUTTONS

The buttons displayed in SPOT are large enough to allow easy selection with a touch screen. Mouse use is greatly enhanced with this larger size button. Be aware of the following button characteristics.

- **Active**—A selection button is active when text color is dark.
- **Inactive**—A selection button is inactive when text is grayed.
- **Selection Device**—References to selecting a displayed choice are relative to touch screen use. Choices can be physically selected with either a touch screen, mouse, or available keyboard command.

SELECTION TECHNIQUES

In views involving the **VI,** an associated list of invoice numbers within the view allows invoice display selection. Whether from a mouse click or touch screen tap with the finger, the same goal is accomplished.

- **Single Clicking**—Selects the invoice for display in the **VI**. When selected, the line containing the invoice number currently displayed is highlighted in yellow.
- **Double Clicking**—Selects the invoice for the intended function.

An example of this selection process is the order Pickup view. It contains a list of orders to be picked up. Orders are selected for pickup by double-clicking anywhere on the line containing the invoice number. A single-click selects that invoice for **VI** display only.

DISPLAYED LISTS

There are several list views within SPOT. Each list contains title column headers that act as sort buttons. Double-clicking on one of these column buttons forces the list to sort in the order of that header type. For example, the Search list displays orders sorted by order status, double-clicking on the *Invoice #* header button forces the list to sort all entries by invoice number.

KEYBOARD COMMANDS

Uniquely defined keyboard commands corresponding to touch screen buttons are denoted in the lower right-hand corner of each button. Keyboard commands are shown in this document with brackets "[ ]" around the key (note that the touch screen button key does not contain brackets). The following are all examples:

- **Function Keys**—[F1] thru [F12]—i.e., pressing the "F10" function key selects the employee time clock function, **Time Clock [F10]**.
- **Menu Buttons**—[1] thru [9]—i.e., pressing the "2" key from the **HP** selects the "Detail" order processing function, **Detail [2]**.
- **View Tabs**—[A] thru [Z]—i.e., pressing the "R" key from the **HP** selects the "Reports" tab, **Reports**.
- **Standard Keys**— The [F12] button accepts changes and moves to the next step. The [ESC] button always exits from the current view without saving changes.

SCREEN SAVERS

Because of the high demand on computer system resources when running SPOT and Window, we strongly recommend that you do not activate screen savers on any workstation or server, especially moving 3D graphics.

About SPOT

SPOT is a highly advanced drycleaning management system that utilizes the latest 32-bit Microsoft Windows architecture and technology. It is designed to be a highly effective solution to the drycleaners operational needs. As such the following should be considered.

- **Initial Configuration**—As installed, SPOT is configured to operate the way an typical drycleaner requires. Fine-tuning the system to specific needs is usually always required. You will quickly come to appreciate the long-term benefits of the added flexibility and expandability of SPOT.
- **Adaptability**—Since most drycleaner's operating requirements tend to be uniquely different from each other, SPOT was created to contain many adaptive configuration options. At first glance, SPOT may seem overly complex, but much of this comes from its ability to adapt to the need of the drycleaning environment. In practical use, few operators will use all of SPOT's feature set, only differing subsets of various configuration options. As such, an important part of learning SPOT is knowing which features to use initially, leaving the others for future consideration. Onsite training can shorten this learning curve considerably. Once configured, SPOT is easy to use. Familiarity makes almost everything easy.
- **Screen Views**—One of the major advantage of Microsoft Windows is its ability to utilize screen real estate more efficiently. Countless hours have been logged designing screen views to be as efficient as possible. Each function was scrutinized, then organized to be as logical and easy to use as possible. Then, the final implementations were subjected to hundreds of drycleaning users for feedback and redesign if necessary. Nothing was left to chance. Our basic screen design philosophy was to minimize the number of screen views required to complete a given function to make ease of use and fast operation priorities. So, screen views may at first glance appear overly busy, but with use, you will come to appreciate why this is necessary.

Operating Modes

SPOT software supports two basic modes of operation to suit your operational needs and budget.

STAND-ALONE

In this mode, the entire computer system is located within each store. A system can be either a single computer or an entire multiple-terminal local area network (LAN). Wide-area networking (WAN) is possible, but not recommended due to high bandwidth requirements. Databases are local to each store site and data consolidation across multiple stores is not practical. Data backups and computer maintenance must be performed at each store site.

CENTRAL HOSTING

This mode is for those requiring real-time production workflow management across multiple stores. Data consolidation is accomplished by using high-speed data connections pointing back to our commercial data center containing the centralized SPOT server network. Hosting services can be obtained from SPOT Business Systems. This mode is perfect for those who have centralized data needs with a small or large number of store locations and who need real-time order tracking between stores and plants. Centralized accounts receivable, pricing, promotions, marketing, inter-store messaging, time clock management, and reporting are inherently simple in this mode.

Getting Around the System

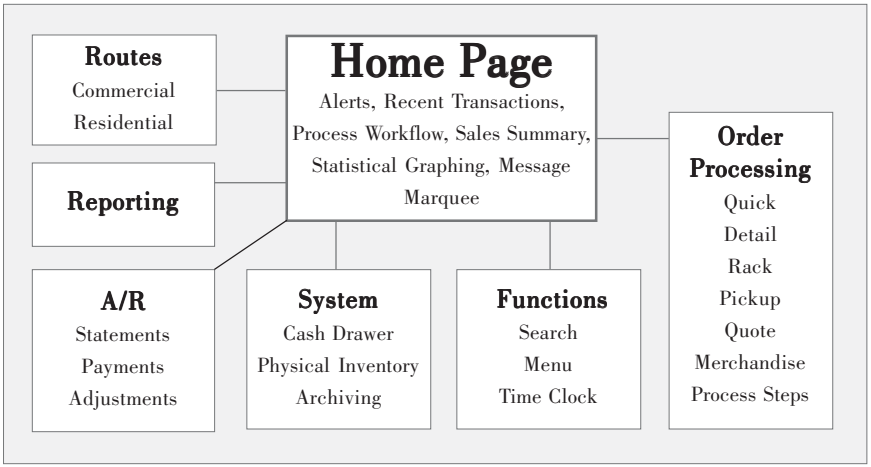
Home Page

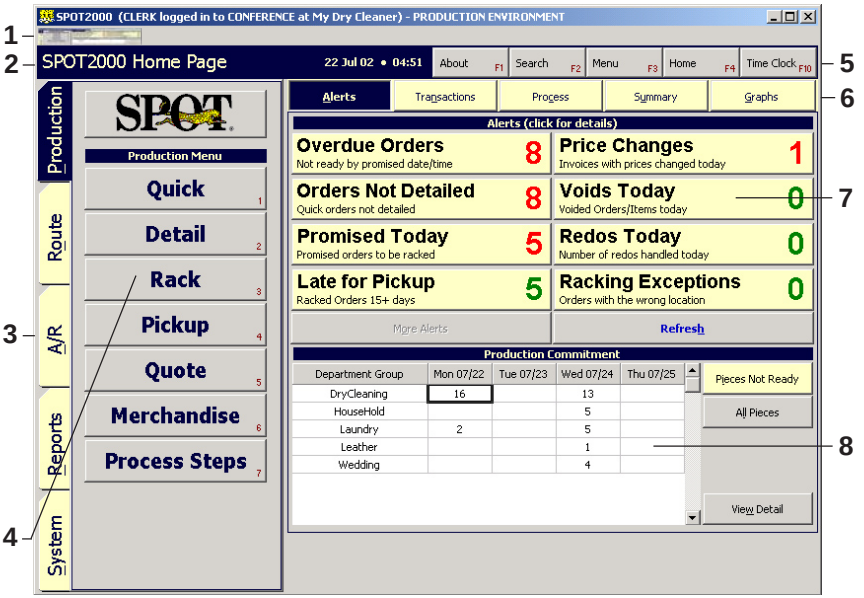
Visual Invoice

Security Access

Sequence of Events

SPOT is a robust drycleaning management system uniquely designed to make learning and using the system easy. Based on the popular Microsoft Windows operating system, SPOT has a highly organized user interface made extremely easy to use by the effective implementation of touch screen design. A mouse and keyboard can be used together as an alternative to a touch screen.





*Home Page (***HP***) View—**Alerts Tab***

Home Page

The Home Page (**HP**) view is the control center for SPOT. It provides an effective command center from which to access operational functions and view vital system information.

DEFAULT HOME PAGE VIEW

By default, the **HP** view is always displayed with the Production tab and System Status views active. This default view is always displayed when the following occurs:

- Initial system startup.
- Upon return from any system function.
- Pressing the function button **Home** [F4].

HOME PAGE ELEMENTS

1 Drop Down Bar Display

Designed for mouse navigation, this area provides access to various system operations, such as setup, configuration, and licensing utilities.

2 Title Bar Display

Shows the currently selected system function along with the current time and date as set by the computer's clock.

3 Operation Tabs

Production—Order processing functions (default).
Route—Route management utility.
A/R—Accounts Receivable utility.
Reports—Management reporting.
System—Operational utilities.

4 Production Menu Buttons

Quick [1]—Receive without price and describe, prints claim check.
Detail [2]—Receive with price and describe, prints invoice.
Rack [3]—Assign completed orders to a storage location.
Pickup [4]—Customer order pickup, prints pick list.
Quote [5]—Order pricing with order completion optional.
Merchandise [6]—Sell merchandise items directly.
Process Steps [7]—Log orders to definable workflow step.

5 Function Buttons

Search [F2]—Order search function.
Menu [F3]—A collection of lesser used but important functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

6 View Selection Buttons

Alerts—Selects the default Alerts and Production Commitment view.
Transactions—Selects a list of the 25 most recent transactions.
Process—Selects a graphic order process view.
Summary—Selects a sales summary view.
Graphs—Selects statistical graphs.

7 Alerts Display

Alerts provide continual automatic problem notification by way of an annotated alert button. When a problem occurs, an alert button displays the problem along with the magnitude of the problem. Pressing an alert button displays the Search view (described in a later chapter) listing all affected orders. For example, when an alert button indicates that several orders are *Overdue Orders* as promised, pressing the alert button displays this list of orders.

Alerts are script-based with new alerts planned for future releases. In addition, alerts can have defined color coded limits. For example, an alert might be set to provide a *green* indication (acceptable condition) until the count reaches 25 or larger then turn *red* (a warning condition). Alerts are automatically updated every 5 minutes.

- **More Alerts Button**—When active, this button indicates that more alerts exist. When pressed, the next group of alerts are displayed.
- **Refresh Button**—Press to update Alerts and Production Commitment status prior to the automatic update.

8 Production Commitment Display

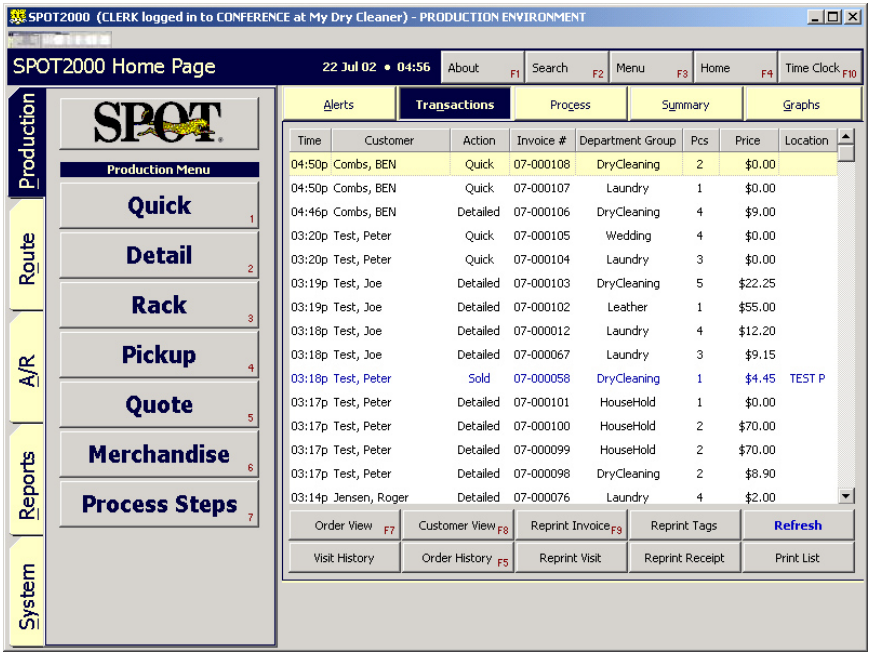
The view shows the number of pieces committed to by department for the current day plus three additional days of future production. Each order received, either by Quick or Detail, affects the piece totals displayed.

- **Pieces Not Ready Button**—Shows pieces not racked.
- **All Pieces Button**—Shows all garments, including those racked.
- **View Detail Button**—Highlight a piece count cell and press to display the Search view with all affected orders listed.

TRANSACTIONS VIEW

Used to aid in rapid order access for customer assistance, this view lists the 25 most recent order transactions occurring across all workstations at the site. Recent transactions include production oriented steps where the customer is typically present, such as *Quick*, *Detail*, and *Pickup* (sold). Orders from the *Rack* process are not displayed in this list. The list is color coded by order status for easy recognition:

- **Receive (Quick, Detail)**—Black
- **Pickup (Sold)**—Blue

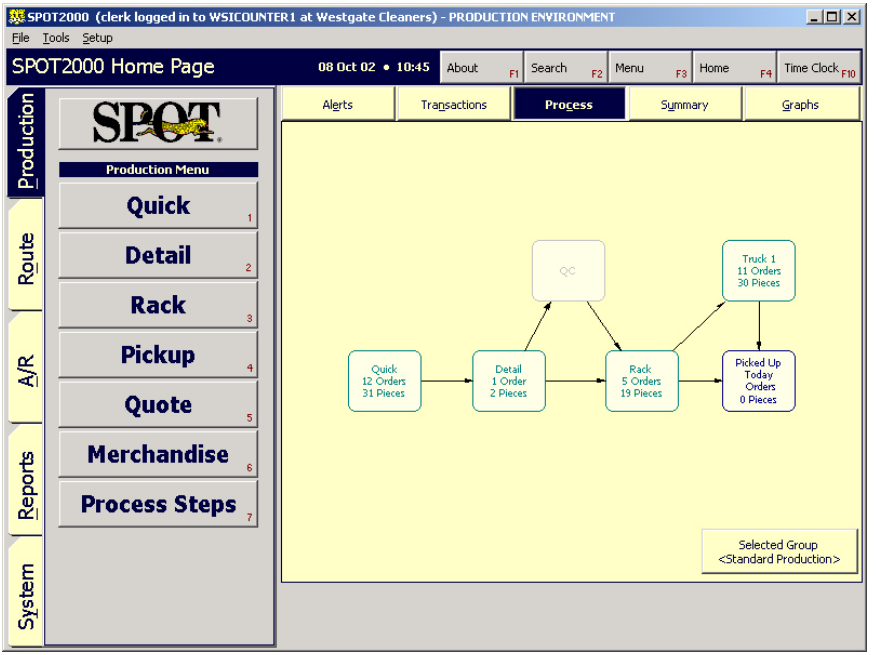


*Home Page (***HP***) View—**Transactions View***

Highlighting a transaction in this list, then pressing a selection button at the bottom of the list provides quick access to the following functions:

- **Order View [F7]**—Activates Order View utility for order editing.
- **Customer View [F8]**—Displays the Customer View (**CV**) dialog.
- **Reprint Invoice [F9]**—Reprints a copy of the selected order with the word "*Reprint*" shown at the bottom for security.
- **Reprint Tags**—Reprints demand tags for the selected order.
- **Visit History**—Displays the Search view with all orders created as a result of intelligent invoice splitting (called a visit).
- **Order History [F5]**—Lists the sequence of order production.
- **Reprint Visit**—Reprint the initial Visit ticket with all orders listed.
- **Reprint Receipt**—Prints a customer receipt in standard POS format.
- **Print List**—Prints a copy of the Transaction list.

Transactions displayed in this list are automatically updated upon initial entry and will automatically update every 15 minutes (default) or if the **Refresh** button is pressed. The automatic update time can be changed under configuration by workstation.



*Home Page (***HP***) View—**Process View***

PROCESS VIEW

Pressing the Process button displays a graphic snapshot of all orders and pieces currently in queue at each process step for the selected production group. By creating definable process steps within SPOT, orders can be tracked through almost any production scenario. For example, in the sequence shown, an order assembly step could be added between the Detail and Rack step.

Each process step box displays the number of orders and pieces currently at that step, even if an order is older than the current day. The exception to this is the *Picked Up* box, which shows all sold orders for the current day only and is automatically reset at the beginning of each new production day. Selecting a step box displays a list of orders by invoking the Search view.

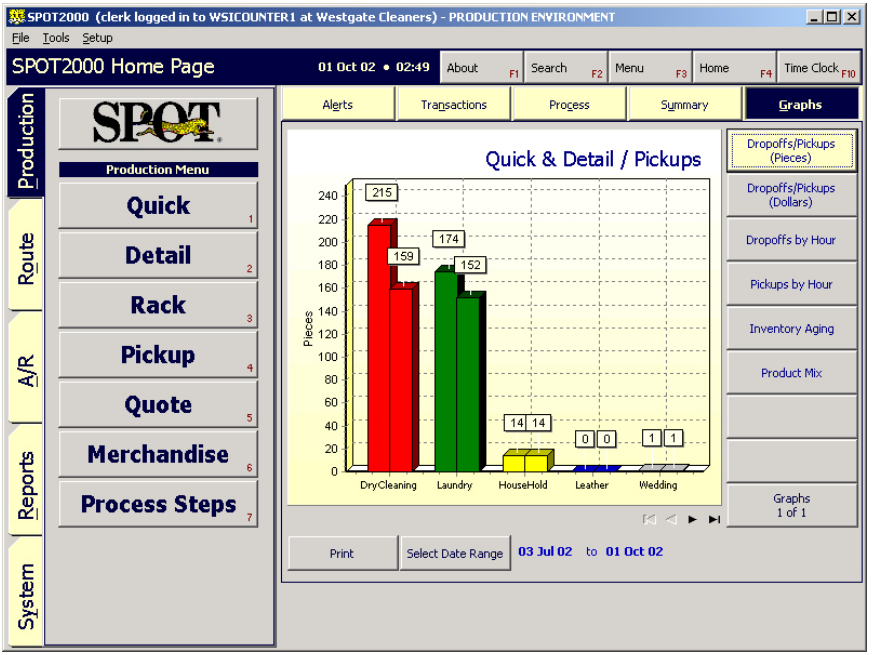
- **Selected Group Button**—Selects a predefined department group.

*Home Page (**HP**) View—**Summary View***

SUMMARY VIEW

This view shows sales information for dropoffs and pickups as well as adjustments and other vital information. Upon initial entry into this view, totals at that instant in time (current day) are automatically displayed with the update date/time shown below the *Refresh* button. As an option to displaying only current totals, a date range can also be specified.

- **Select Date Range Button**—Allows the Summary view to display totals across a date range. The selected date range is shown below this button.
- **Refresh Button**—Forces an update of the currently displayed data. The date/time of the refresh is shown below this button.

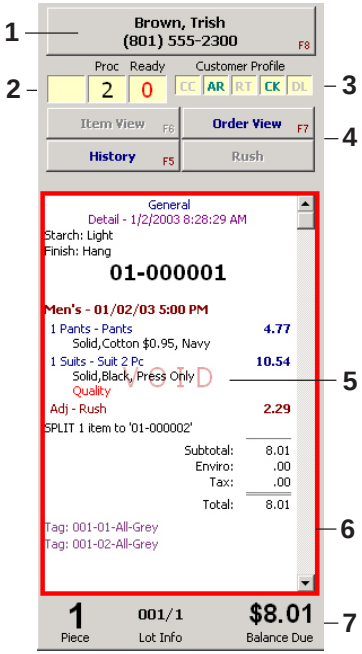


*Home Page (***HP***) View—**Graphs View***

GRAPHS VIEW

Graphs provide a revealing look into order production and productivity. A date range can be specified. The default is the current day. Graphs can also be printed. There are currently six graphs available:

- **Dropoffs/Pickups (Pieces)**—A bar chart showing the comparison of the number of pieces dropped off (left) to the number of pieces picked up (right) by department for the current day only. This graph automatically starts at zero at the beginning of each production day.
- **Dropoffs/Pickups (Dollars)**—Same as above, but with dollar totals.
- **Dropoffs by Hour**—A line chart showing the number of pieces and orders dropped off by hour for the current day only.
- **Pickups by Hour**—A line chart showing the number of pieces and orders picked up by hour for the current day only.
- **Inventory Aging**—A bar chart showing the total number of completed orders (racked and ready to pickup) by aging group: 0-30 days, 31-60 days, 61-90 days, and 91+ days.
- **Product Mix**—A pie chart showing the percentage of each department compared to the total for the most recent thirty days. Only the first four configured departments are compared with all other departments summed together.



Visual Invoice

Visual Invoice

Not only does the Visual Invoice (**VI**) provide a view of order content and customer status, but it acts as a standard access point to commonly used functions such as the Customer View (**CV**), order/item content editing, order history, and Heat Seal Label (HSL) item lookup. For example, a customer phone number change made during order pickup is simply a matter of pressing the **Customer** button on the **VI**, making the phone number change, and continuing with the pickup.

The **VI** is available on many SPOT views such as Quick, Detail, Rack, Pickup, Quote, Merchandise, Process Steps, Search, Physical Inventory, etc. It shows all current and past order modifications as well as adjustments annotated with watermark identifiers for long-term history. Printed (or reprinted) paper invoice copies contain only necessary information, avoiding customer confusion. For example, an item voided from an order will contain the watermark "VOID" in red, indicated only on the **VI** and not on the printed receipt.

The **VI** is an integral part of SPOT and always looks the same, with the same physical and visual elements. This adds consistency to use, greatly minimizing learning time.

1 Customer Button

The **Customer [F8]** button indicates the currently selected customer by name with phone number verification in the event of duplicate names. Select this button to view and/or edit customer information via the **CV** view. This button allows quick access to common customer requested changes, such as phone numbers, address, etc.

2 Customer Status Indicators

[Reserved]—For future release.
Proc—Indicates the number of orders in process (not racked).
Ready—Indicates the number of racked orders ready for pickup.

3 Customer Profile Indicators

These indicators provide quick visual feedback of service status for the selected customer. Grayed-out indicators are inactive services.

CC (Credit Card)—Green if **CCOF** active, red if expired.
A/R (Accounts Receivable)—Green if active, red if charge restricted.
RT (Route)—Green if active.
CK (Checks)—Green if OK to take checks, red if not OK.
DL (Drivers License)—Green if license valid, red if expired.

4 Order Buttons

History [F5]—View production history for the selected order.
Item View [F6]—View or edit item-level invoice entries.
Order View [F7]—View or edit order-level invoice entries.
Invoice Mode—Apply predefined promised date and adjustment offsets to the selected invoice. The default is *Standard* (no offsets).

5 Invoice Content

This area contains a detailed rendering of the selected invoice for the selected customer. Changes made to the selected invoice (voids, redos, etc.) are always shown, maintaining a visual record of historical order activity. Only pertinent information is printed on the customer copy. Additionally, this area will always display the breakdown of item and upcharge amounts. The printed copy can be made to itemize upcharge costs or summarize amounts in the item total (effectively hiding the upcharge cost in the item total). Depending on the displayed order, invoice content elements may include:

- Price table reference
- Order number
- Order status
- Promised date and time

- Original Quick entry information
- Department
- Item quantity and detail
- Upcharge quantity and detail
- Coupons, discounts, voids
- Order starch and finish preferences
- Tag numbers (preprinted tags only)
- Heat Seal Label (HSL) number
- Split order reference order numbers
- Environmental surcharge and sales tax
- *Sold* status, date and tender type for picked up orders
- Customer and order memo notices
- Order change watermarks: *Redo*, *Split*, *Void*, *Deposit, Pay Later, Reversed, Price Later, Prepaid, and Not Paid*

6 Mode Indicator Border

Indicates the selected Invoice Mode in the predefined color. If the mode is Standard (default), no border appears.

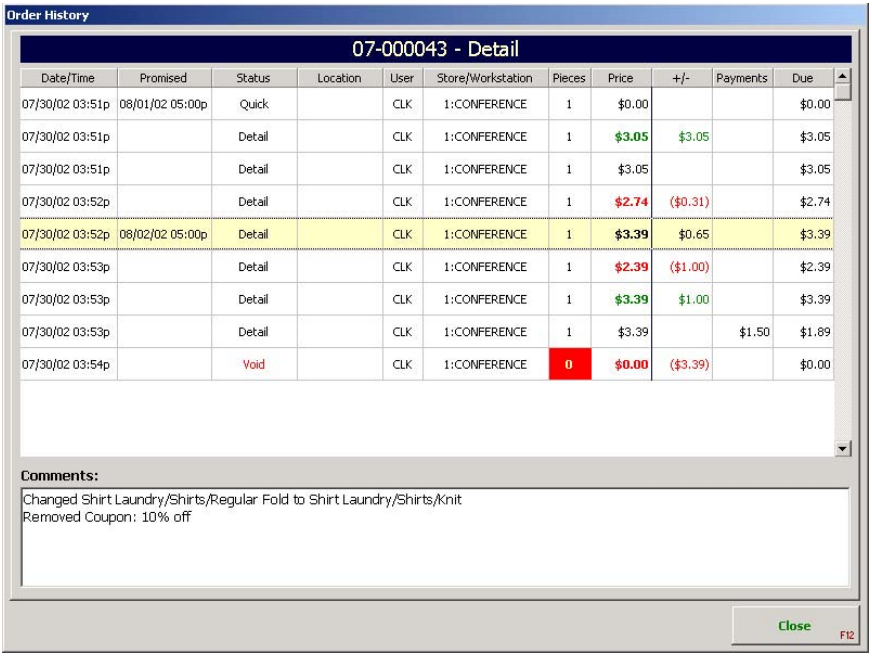
7 Order Totals

Pieces—Indicates the total number of pieces in the selected order.
Lot Tracking—Indicates current lot tracking numbers (if active).
Balance Due—Indicates current balance due for selected order.

INVOICE MODE

This flexible function lets the user select one of several user-definable invoice modes. Each button press changes the mode to the next defined choice, wrapping around to the first (default) from the last choice. Each mode adds to the selected invoice a predefined *Mode Name*, *Promised Date Offset*, *Adjustment*, and *Border Color*. The mode name becomes the button label while the associated border color provides instant visual mode recognition. The default mode for newly created orders is *Standard* (this button label can't be changed) and means that there are no offsets applied. The order mode can be changed at any time. A special label, that contains the word *Rush*, applies the defined offsets and observes the standard SPOT lot/tag order rush logic (tag printing to a special paper color, such a *Red*).

As an example, a new mode is added called *Same Day*. When selected, this mode could make an expedite adjustment of 10% to the invoice, adjust the order promised date to the current day, then set the **VI** border color to *Orange* and change the mode button name to *Same Day*. Everything happens automatically with each selected mode. Numerous modes can be defined at the users discretion; however, the most common modes are *Standard* and *Rush*.



Order History Dialog—Access from **VI History [F9]** *Button*

ORDER HISTORY

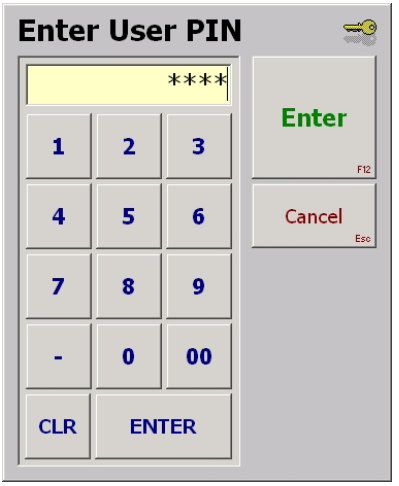
This expanded full-screen order history dialog shows every activity affecting an order's value. For example, if an order has had a piece count or adjustment change, these are listed as separate line items with the detail of the specific change shown in the *Comments* field at the bottom. The top line shows the selected order number and its current status in the system. The user has the ability to use either the original order history or this expanded order history function. The only disadvantage to the new history function is that it may slightly reduce performance in large systems due to the extra informational updating necessary. Access to this function is available using the **History [F5]** button available from the following areas of SPOT:

- Visual Invoice
- Home Page Transactions Tab
- Route Management View
- Order View
- Item View

Problem Identification

- **Order Piece and Price Change Indicators**—If an order piece count or price changes as the result of an action to the order, the decrease change (-) is noted in *Red* and the increase change (+) is noted in *Green*.
- **Order Promised Date Changes**—Promised date changes are indicated with the new promised date/time entered in the *Promised* column. Otherwise, the field is blank to reduce clutter.
- **Order Value Change Audit Trail Ledger**—The three columns on the far right side (*+/-*, *Payments*, *Due*) form an audit trail ledger designed to show how the invoice value changed as a result of applied discounts, coupons, adjustments, or payments with the formula *"Due" (previous line) + "+/-" - "Payments" = "Due" (current line)*. The result is a view that allows instantaneous assessment of order abnormality. This is a tool to help deal with and prevent theft loss due to inappropriate actions to orders.
- **Change In Detail Description**—Highlighting a row displays the details in the *Comments* field of specific order changes.

Note that this history function is not retroactively compatible with historical data from a prior version without this function. Attempting to view order history created under an old version of SPOT may result in a blank view. A utility is available for conversion of prior history data. Contact technical support for assistance.



Security Access Via **PIN** *Dialog*

Security Access

User navigation within the system is restricted using **PIN**s (Personal Identification Number). **PIN**s are rights-based passwords assigned to users (clerks). **PIN**s can be auto-assigned by SPOT or manually selected and entered. Reassignment of a SPOT assigned **PIN** is possible from the **Menu [F3]** function. For example, the following groups are created by default in SPOT:

- Admin
- Owner
- Manager
- Counter
- Route
- Detailer
- Production

Each group is assigned access rights to various functions. Users are then assigned to each group. This process makes it easy to add a new employee, for example a new counter person. Simply add the new employee, assign to the Counter group, and all access rights for that group are automatically inherited by that new employee.

There are two reasons to use the SPOT security system:

- Restrict employee access to specific areas of the program.
- Track chronological sequence of use events by employee.

The second reason is an important part of SPOT's employee theft loss detection and prevention function, the *Activity Log*.

Assigned **PIN**s can be from one to five digits long. The larger the **PIN** the greater the security of access. **PIN**s should be at least four digits long for an acceptable level of security. Management personnel should set their **PIN**s to the full five digits. Use **PIN**s that are easily remembered, such as the last four digits of a phone number or Social Security Number.

PIN entry can be made from either the displayed touch screen pad or the numeric keyboard pad, whichever is most convenient. For security reasons, each entered digit displays an "*****". Default passwords have been preassigned to all newly installed systems. To maintain security, it is highly recommended that these be changed prior to live system use. Existing defaults are:

- **Administrator**—**PIN** = 9191
- **Clerk1**—**PIN** = 1 (touch screen Detail mode)
- **Clerk2**—**PIN** = 2 (keyboard Detail mode)

SECURITY MODES

There are three separate security modes. SPOT is shipped with **PIN** security active.

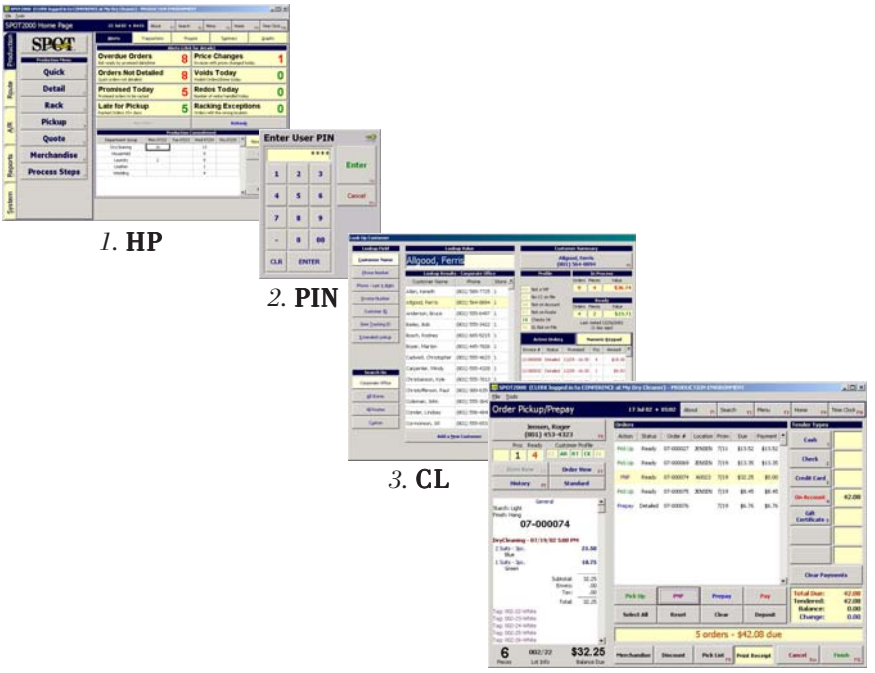
- **No Security**—Does not prompt for **PIN** entry anywhere in the system.
- **PIN Security**—Prompts for **PIN** entry and grants access to selected functions based on assigned user or group rights. Each attempt to access a protected function requires **PIN** entry. This is the most secure mode, but does require a little added time for **PIN** entry at each attempt.
- **Timed Security**—This global mode requires user **PIN** entry initially and will time out after a preset (configurable) period of time if no system activity is detected. Normally, the time-out period is set to 10-15 minutes. All users are in timed mode with this option selected. This mode is less secure because another user could use the system if the logged-in user is not present for a brief time. To prevent this from happening, use the **HP Logout** button appearing just below the **HP Process Steps [7]** button. A clerk leaving an active workstation can immediately logout by pressing this button, thereby securing the workstation until new **PIN** entry occurs.

Sequence of Events

Navigating around SPOT is easy. Depending on the operational function selected and **PIN** security configuration, certain intermediate choices might appear. Almost always, a function is selected from the **HP**. As an example, consider how an order is handled during the order Pickup process using the following sequence of events with security enabled:

1. From the **HP**, select **Pickup** [4]
2. Enter **PIN**, select **Enter**
3. **CL** by name, phone, or scan claim check
4. Proceed with the order Pickup process
5. Return to **HP** is automatic

There are two additional, but necessary, steps needed to get to the order Pickup function: selecting a **PIN**, then selecting the customer picking up orders. The customer lookup process is described in greater detail in the next chapter. This process is illustrated better with actual process step views:



1. **HP**

2. **PIN**

3. **CL**

4. Order Pickup

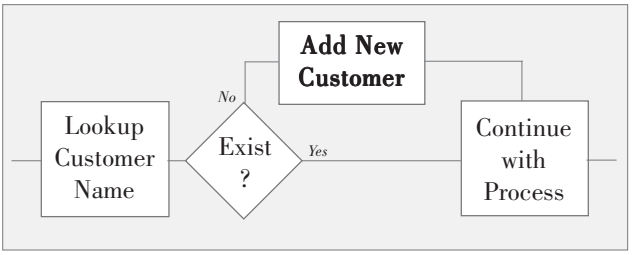
Customer Management

Customer View

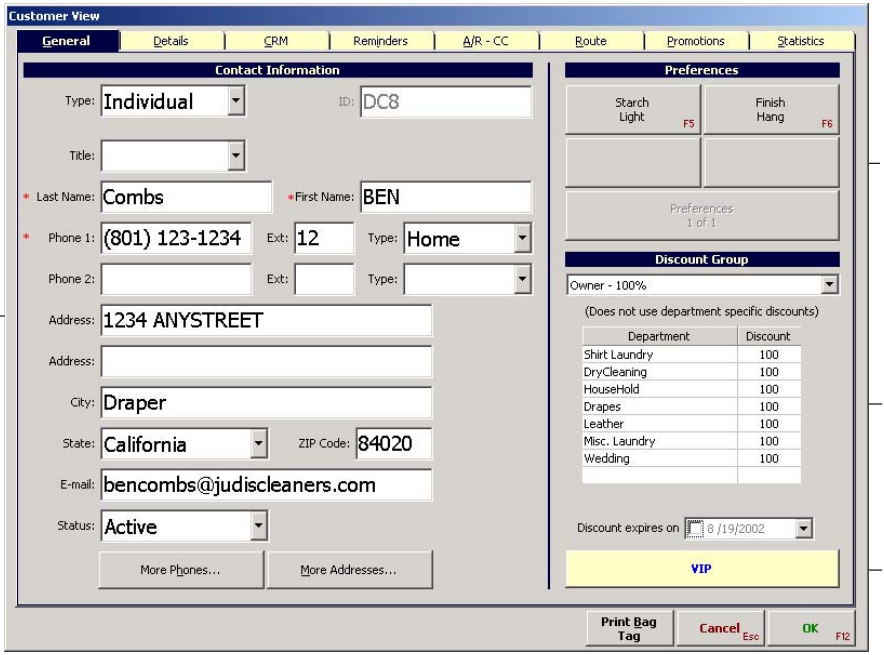
Customer Lookup

Maintenance

*SPOT provides all of the utilities needed to manage customer data with ease. There are two basic customer functions, the Customer View (***CV***) where details about the customer are displayed and edited, and the Customer Lookup (***CL***) view that provides a method for customer selection during order processing. A variety of lookup formats are provided for added flexibility such as by name, phone number, account number, etc. The incremental lookup feature allows for visual drill-down during lookup—a highly intuitive and user friendly process when large numbers of customer records exist. In addition, **CL** is uniquely designed to provide lookup-add-select functionality. This feature makes it easy to lookup a customer. If not found, simply add and then select the new customer.*



*Customer Lookup—**Add/Select Process***



*Customer View (**CV**) Dialog—**General Tab***

Customer View

This view consists of several Customer View (**CV**) related tabs, providing a high degree of organization. Note that some fields have restricted access or may be display-only fields. **CV** is accessed by pressing the **Customer [F8]** button from the following areas of SPOT:

- Visual Invoice (**VI**) view.
- Customer Lookup (**CL**) view.
- Home Page (**HP**) Transaction view.
- Route tab view.
- **A/R** Apply Payments view.

The **Print Bag Tag** button prints a barcoded customer bag label or card for the selected customer when pressed. This button is available on all **CV** tab views.

GENERAL TAB

This is where new customer information is added or existing customer information is edited. The General tab is selected by default when **CV** is first entered. Press any other **CV** tab to select additional customer information views. The **OK [F12]** button saves changes and exits **CV**.

1 Contact Information

For ease of entry and change, customer information is made of large entry fields. The most common customer information is entered in this area which facilitates adding a new customer quickly. A red "*****" indicates that field information is required before saving.

- **More Phones...**—Raises a dialog to display/add additional phone numbers for this customer.
- **More Addresses...**—Raises a dialog to display/add additional addresses for this customer.

2 Preferences

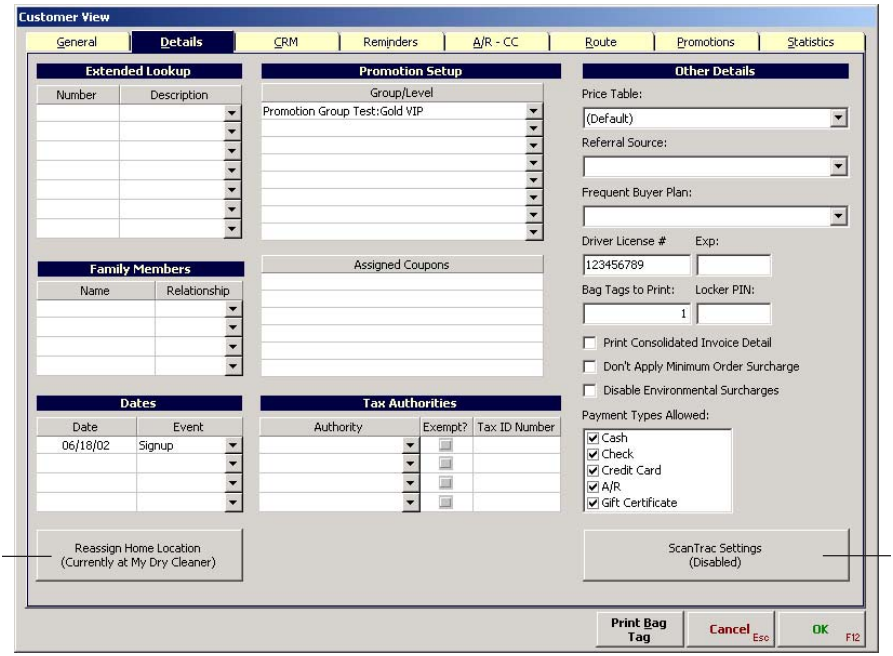
Preference types are user-definable within the SPOT system, then displayed on these four buttons for assignment to the selected customer. These are typically used in laundry production to preset starch and finish preferences. Once selected, these preferences are retained and shown on all subsequent order invoices until changed. The **Preferences 1 of X** button displays additional selection choices if more than four preferences are created.

3 Discount Group

Discount groups are deductions given to a customer by percentage of the total department amount. When activated by selecting a user-defined discount group from the dropdown, discounts are automatically applied during order detailing.

4 VIP Button

Pressing this button causes the selected customer's name to be indicated in *Blue* on customer selection buttons and customer lists for quick identification. In future releases, this status will also allow for special automatic handling of coupons, promotions, bag tag printing, etc.



*Customer View (***CV***) Dialog—**Details Tab***

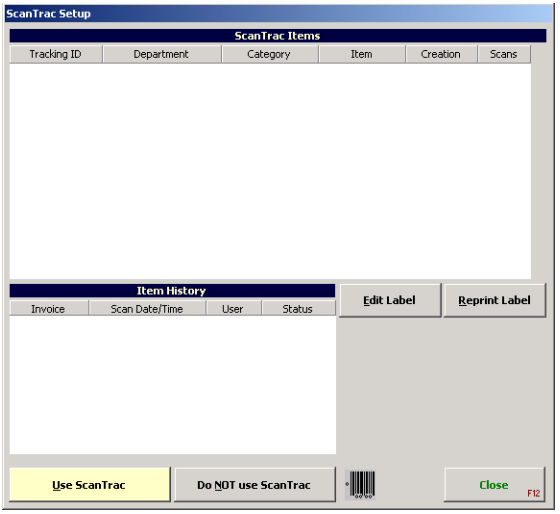
DETAILS TAB

This tab is used to establish alternate Customer information.

- **Extended Lookup**—Alternate lookup text such as license plate number, video rental membership card, etc. This lookup is activated from the **Extended Lookup** button on the **CL** view.
- **Family Members**—Alternate **CL** family members.
- **Dates**—Adds important dates such a anniversary or birthday.
- **Promotion Setup**—A user defined promotion group is selected here with associated coupons displayed in the *Assigned Coupon* list.
- **Tax Authorities**—Selects predefined tax rates and exemptions.
- **Other Details**—Assigns the price table, frequent buyer program, drivers license, environmental surcharges, and allowed tender types for the selected customer.

1 Reassign Home Location Button

Used only in centralized real-time configurations, this button allows for the assignment of the store location the customer normally uses. Once assigned to a store, the customer is included in the range of local customers during **CL**.

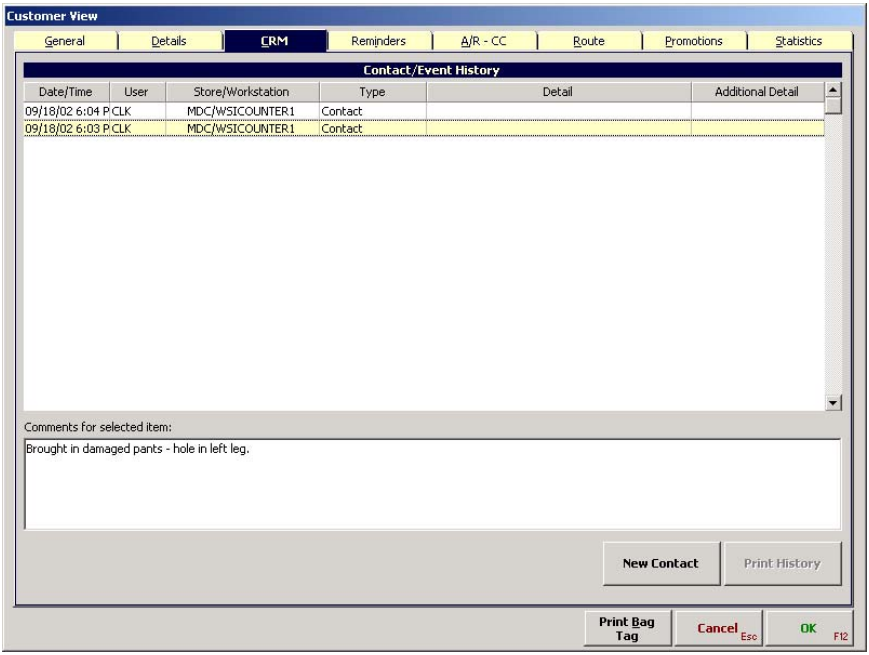


Details Tab—***ScanTrac Settings Dialog***

2 ScanTrac Button

This button provides garment cleaning history for the selected customer using a barcoded *Heat Seal Label* (HSL). Barcoded HSL labels essentially serialize garments, memorizing all pertinent garment detailing information. Scanning each HSL label during the Detail process step automatically retrieves memorized descriptors creating a line item on the **VI**, saving time detailing the same garment each time it is received. HSL is also used with the SPOT Assisted Assembly process step. Note that HSL use requires a dedicated HSL printer.

- **ScanTrac Items List**—Provides a list of each garment containing a HSL barcode. Highlighting each garment displays garment cleaning cycle information in the *Item History* list.
- **Item History List**—Displays a complete history of all cleaning cycles for the selected garment.
- **Use ScanTrac Button**—This button activates automatic HSL label printing during Detail for the selected customer.
- **Do NOT use ScanTrac Button**—This button deactivates automatic HSL label printing during Detail for the selected customer.
- **Edit Label Button**—Provides a way to modify the memorized descriptor contents of the selected garment.
- **Reprint Label Button**—Reprints a new HSL label for the selected garment.

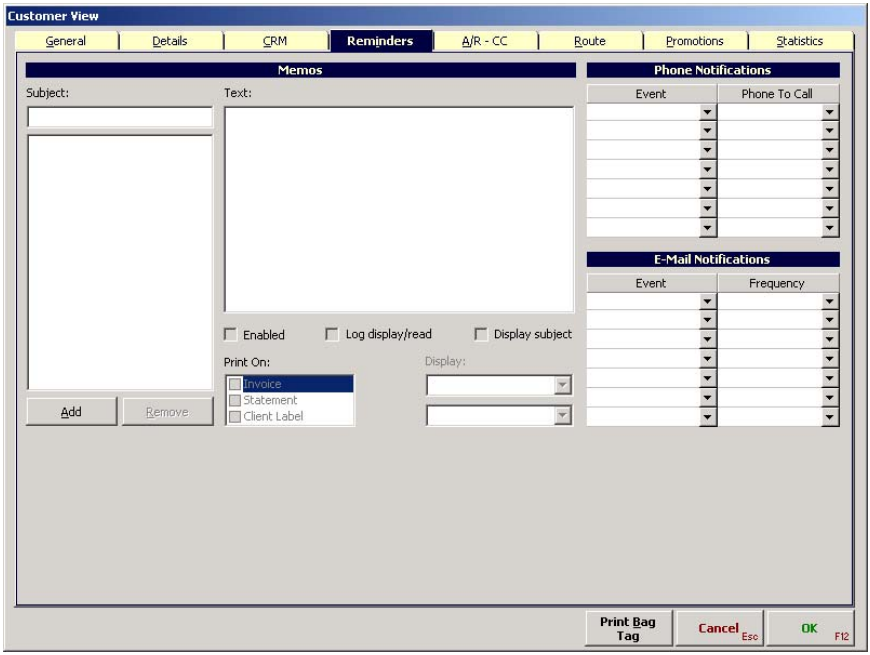


*Customer View (***CV***) Dialog—**CRM Tab***

CRM TAB

The Customer Relations Manager (CRM) provides a convenient way to handle customer issues that occur over a range of days or months. For example, a customer reports a problem with a garment alteration that requires interaction with the seamstress. Over a period of several days, entries are made into the CRM detailing the sequence of events as each occurs. Regardless of who the customer speaks with regarding this issue, the full history of events is known, greatly enhancing intelligent interaction with the customer. Use CRM to track issues such as overdue invoices, late statement payments, bad checks, lost/damaged orders, etc.

- **New Contact Button**—Adds new events to the customer record. The user (clerk), store, workstation, and date/time are all automatically logged with the entry of a new event. Event types and resolution are user definable and are selected when adding an event. Detailed comments for each event selected in the *Contact/Event History* list event are displayed in the *Comments* field.
- **Print History Button**—Allows event history to be printed to the report printer.

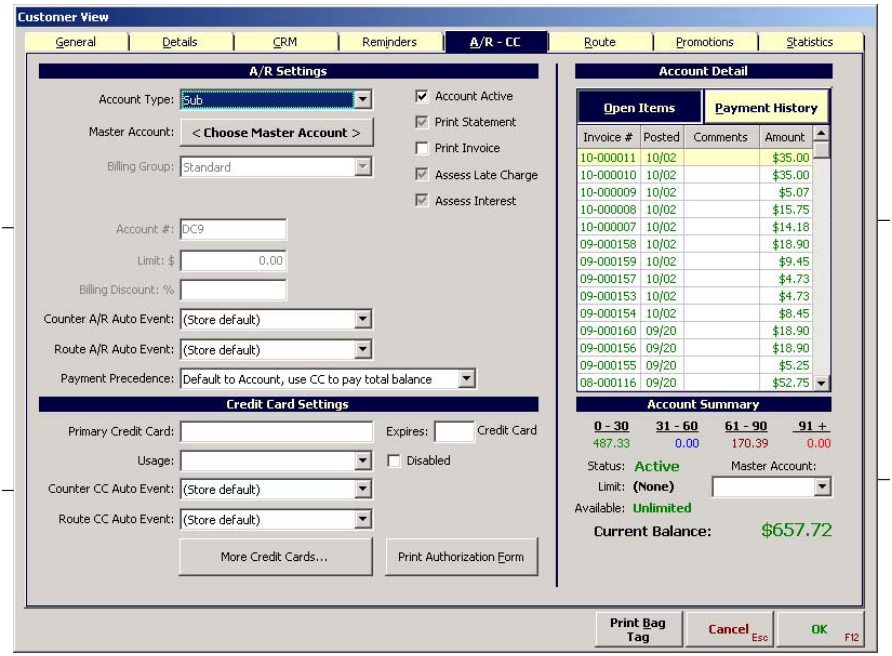


*Customer View (***CV***) Dialog—**Reminders Tab***

REMINDERS TAB

This tab activates various types of notification actions for the selected customer. Memos are used locally within the system for immediate notification via the monitor, printed invoices, statements, or labels.

- **Memos**—This section allows you to create multiple specialized memos for display on various printed forms and to provide a dialog prompt at a defined processing step. Enter a new memo name in *Subject* field and press the **Add** button to add to the list. The text message is then assigned to the selected subject. Several subjects can be added. For each selected subject, set all appropriate print and display attributes. The **Remove** button deletes a selected subject.
- **Phone Notifications**—Prompts the optional *telephony* module to automatically call a customer, such as the night before a scheduled route pickup. Multiple events can be selected based on event availability.
- **E-Mail Notifications**—Set this option to send emails based on defined events, such as order ready for pickup. This feature requires Microsoft Outlook with an Internet connection and a valid email account. Dialup modems are not recommended for this function.



*Customer View (**CV**) Dialog—**A/R - CC***

A/R - CC TAB

Customer oriented Accounts Receivable (**A/R**) and Credit Card (**CC**) actions are established in this tab. During order pickup, orders can be charged to a customer's **A/R** account or **CC**. For added flexibility, a special option allows orders to be charged to an **A/R** account, but paid for by a Credit Card On File (**CCOF**). This tab also provides a quick view of current and past **A/R** history. See the *Accounts Receivable* chapter for additional details on using the **A/R** function.

1 A/R Settings

Use this area to determine type and options for an **A/R** customer. Note that there can be **CC** interaction associated with **A/R** accounts as described below.

- **Account Type**—Master account or subaccount is defined. Multiple sub-accounts are consolidated to a single printed master account.
- **Choose Master Account**—If the account type is set to *Sub-Account* in the Account Type field, this button contains the master account to which consolidation occurs during statement printing. Pressing this button forces the **CV** dialog to appear for master customer selection.

- **Billing Group**—Definable groups allow printing in selected batches. For example, a Billing Group could be an insurance agency or weekly, bi-weekly, or monthly group of special customers.
- **Agent/Contact**—Used for restoration work to identify the agent. This field is visible only if Insurance is the *Account Type* selected.
- **Account #**—Enter any random alphanumeric account number or let the system assign it by selecting the **Copy From ID** button.
- **Limit**—Sets a maximum charge limit for the selected customer. Setting this field to 0.00 allows an unlimited amount to be charged.
- **Billing Discount**—Applies a statement discount based on the percentage in this field for this customer only.
- **Counter A/R Auto Event**—An order in production can be automatically paid at any defined processing step. It is customary for a counter order payment to occur at pickup only; however, this dropdown establishes an alternate step at which the order is automatically posted to **A/R** for this customer.
- **Route A/R Auto Event**—This is the same function as described above, but for route delivery customers.
- **Payment Precedence**—If automatic **A/R** and **CCOF** are both defined for use at order pickup, this dropdown determines which one applies first by default (see Accounts Receivable section, Customer A/R Setup for additional information).
- **Account Active**—Uncheck this box to restrict charging new orders on account (does not remove account history or amounts due).
- **Print Statement**—Uncheck this box if a statement is not to be printed for this customer.
- **Print Invoice**—Check this box if all related invoices are to be printed along with the statement.
- **Assess Late Charge**—Adds a flat late fee to statement amounts paid late (based on **A/R** billing group configuration settings).
- **Assess Interest**—Adds interest to statement amounts paid late (based on **A/R** billing group configuration settings).

2 Credit Card Settings

- **Primary Credit Card**—Type or swipe a credit card number into this field for Credit Card On File (**CCOF**) storage. Once entered, only clerks with the required security rights can view the entire **CC** number, all others are restricted to the last four digits only. Credit card numbers are automatically encrypted when saved.
- **Usage**—Determines how **CC** payment will be applied during an order pickup session. There are three options: *Never*–disable card use, *Prompt*–prompt user for **CCOF** or swipe other **CC**, and *Automatic*–apply the **CCOF** automatically.

- **Counter CC Auto Event**—An order in production can be automatically paid at any defined processing step. It is customary for counter order payment to occur a pickup only; however, this dropdown establishes the step at which the order is automatically posted to **CC** for this customer.
- **Route CC Auto Event**—This is the same function as described above, but for route delivery customers.
- **More Credit Cards**—Allows additional **CC**s to be accepted against the same customer record for **CCOF** or pickup transactions.
- **Print Authorization Form**—Prints a **CCOF** form to the thermal printer authorizing use of the customer credit card for internal drycleaning charges only. NOTE: National consumer protection laws require that customers authorize credit cards for **CCOF** use. These laws are enforced at the State level. Check with your State for specific requirements.

3 Account Detail

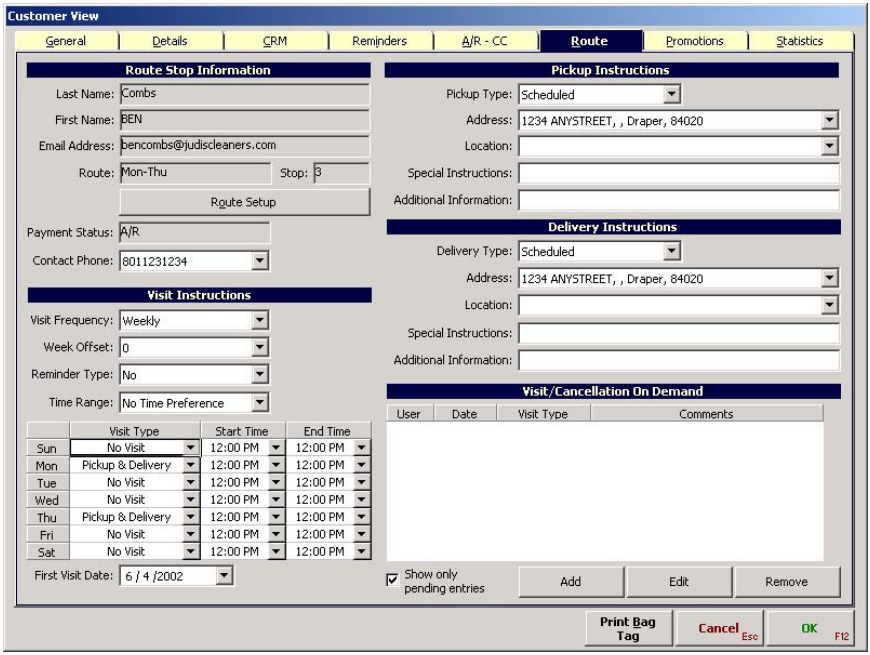
This view is included in this tab as an aid for quick historical access to customer account status. Note that this view is also displayed in other areas of the system, such as the **A/R** Apply Payments view.

- **Open Items Tab**—This default tab view displays a list of all open (unpaid) orders. Note that each line of the Open Items list conforms to aging color coding of the Account Summary (below the list) information providing instant identification of order account status. Order aging color codes are: **Green** (0–30 days); **Blue** (31–60 days); **Maroon** (61–90 days); **Red** (90+ days).
- **Payment History**—Displays a list of all past payments posted on account. Double-clicking on a payment displays the Search view listing all posted invoices.

4 Account Summary

This area shows current **A/R** account status for the selected customer.

- **Aging**—Displays the current payment aging status by color code: **Green** (0–30 days); **Blue** (31–60 days); **Maroon** (61–90 days); **Red** (90+ days).
- **Status**—Displays the current account status, *Active* or *Inactive*.
- **Limit**—Displays current available **A/R** credit amount.
- **Current Balance**—Displays the current balance due.

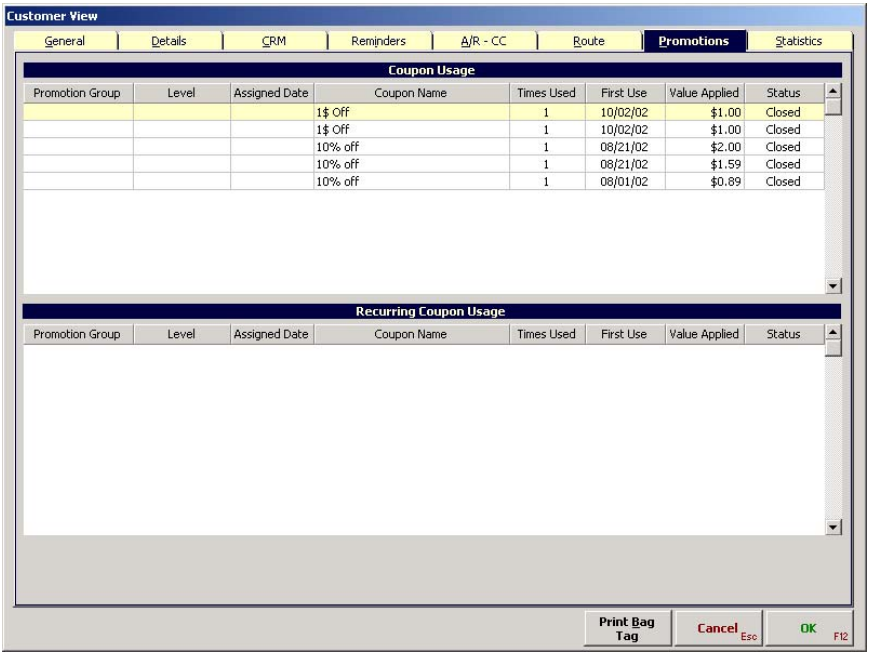


*Customer View (***CV***) Dialog—**Route Tab***

ROUTE TAB

This tab contains much of the same information found in the Route Manager but organized to expose customer specific route data. Changes made in this tab are reflected in the Route Manager and vice versa. Commonly used for customer service help desks or to assist with customer requested route changes, this tab provides instant access to critical route functions such as *Stop* information; *Visit*, *Pickup*, and *Delivery* instructions; and *Demand* schedule changes.

- **Route Stop Information**—Contains stop-specific information.
- **Visit Instructions**—Expanded instructions for visiting a stop. Allows visits to be skipped or delayed and shows the delivery schedule by type and time.
- **Pickup Instructions**—Expanded instructions for pickups.
- **Delivery Instructions**—Expanded instructions for deliveries.
- **Visit/Cancellation On Demand**—Handle on-demand route customers. The **Add** button adds a stop pickup or delivery, the **Edit** button allows changing the selected demand stop, and the **Remove** button deletes a selected stop. The *Show only pending entries* checkbox lists only orders scheduled for delivery. Removing the check lists all orders including previously delivered orders.



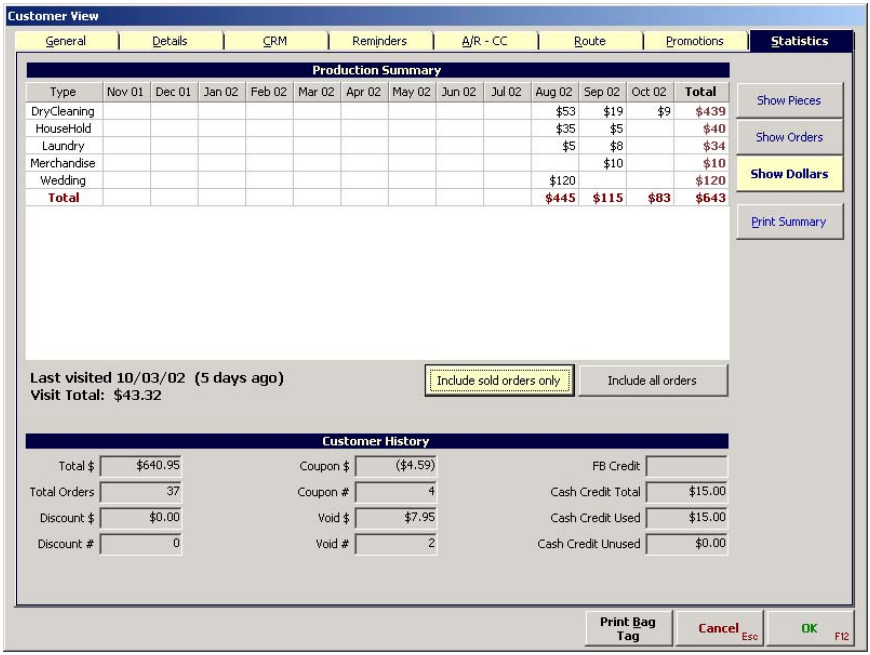
*Customer View (***CV***) Dialog—**Promotions Tab***

PROMOTIONS TAB

This tab shows coupon awards for the selected customer. Coupons are awarded at the time of qualification, while promotions are coupons awarded over time. A promotion triggers a defined coupon once or multiple times (called recurring). For example, a promotion might be configured to last for 3 months. During that time, if the customer brings in a fixed number of items, a coupon is automatically triggered providing an award of a predefined amount, percentage, or free cleaning. The purpose of promotions is to provide incentives for the customer to return to your store with a higher than normal quantity of cleaning items over a long period of time. Two types of coupons are displayed in this tab:

- **Coupon Usage**—Shows all onetime coupons and promotions awarded.
- **Recurring Coupon Usage**—Shows all coupons awarded as the result of a recurring promotion.

SPOT supports and tracks both types of promotions by customer using this tab. Open promotions (in process, not fully awarded) are displayed along with closed promotions (awarded). Viewing this tab for any customer provides clues to shopping motivation.



*Customer View (**CV**) Dialog—**Statistics Tab***

STATISTICS TAB

This view provides order sales statistics information for the selected customer.

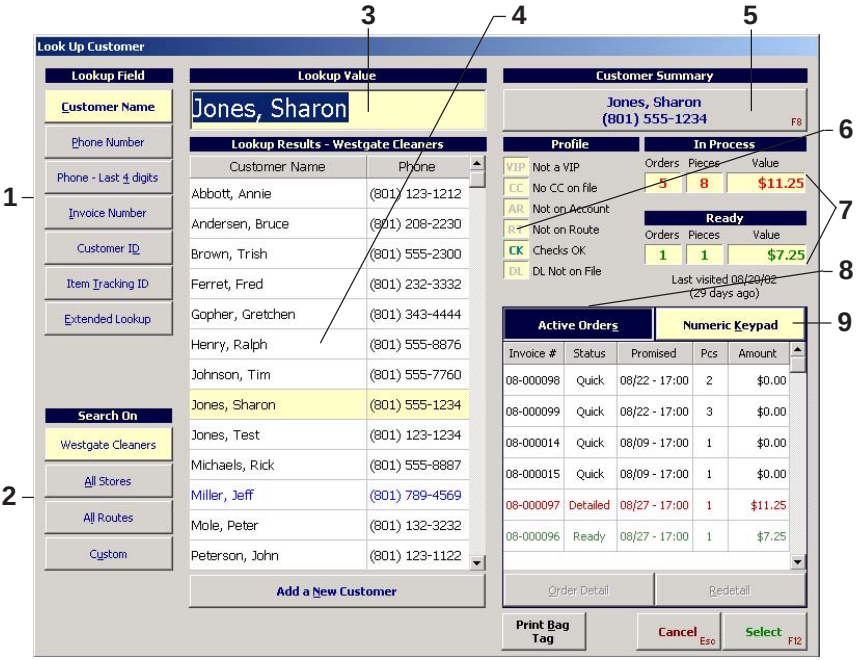
Production Summary

Order history displayed here depicts monthly sales totals by department for the selected customer. Selection buttons provide additional filters:

- **Show Pieces/Orders/Dollars Buttons**—View production summary totals by pieces, orders, or amount. These are toggle buttons allowing only one selection at a time.
- **Print Summary Button**—Prints a summary to the report printer.
- **Include Sold Orders Only Button**—Display sold orders only. This button toggles between the *Include All Orders* button.
- **Include All Orders Button**— Display all orders in process. This button toggles between the *Include Sold Orders Only* button.

Customer History

Shows various cumulative sales totals for the selected customer. Totals include both an amount and counts for each type.



*Customer Lookup (**CL**) View—**Active Orders Tab***

Customer Lookup

The Customer Lookup (**CL**) view is automatically displayed when needed by an order processing step. Lookup can occur by a variety of formats depending on user preference. A new customer can also be added from this view. In a centralized system, **CL** can occur via the network using customer data from a single store or across all stores. Only active customers are displayed in this list.

LOOKUP VIEW

This view may look busy, but it contains a wealth of information. During normal use, only two fields are typically needed, *Lookup Value* and *Lookup Results*. The lookup value can be entered either manually from the keyboard or by scanning.

1 Lookup Field Buttons

- **Customer Name**—Alphabetical lookup by "Last, First" name.
- **Phone Number**—Numeric lookup by 7 digit phone #.
- **Phone Last 4-Digits**—Numeric lookup by last 4 digits of phone #.
- **Invoice Number**—Allows lookup by an existing invoice number.

- **Customer ID**—Uses *Customer ID* number for lookup as established in the **CV** General Tab (ID field).
- **Item Tracking ID**—Uses the ScanTrac (HSL) barcode number for lookup.
- **Extended Lookup**—Uses *Extended Lookup* field information as established in the **CV** Details Tab.

2 Search On Buttons

Used to select the range of customer data the lookup will encompass.

- **Local Store**—Allows lookups for customers in the local store only. The name of the local store is displayed on this button and is the default for all lookups.
- **All Stores**—For centralized multiple store configurations, this button temporarily overrides the *Local Store* button by including customers across all stores.
- **All Routes**—This button temporarily overrides the *Local Store* button by selecting route customers only.
- **Custom**—For centralized multiple store configurations, this button allows the selection of any single store or select group of stores.

3 Lookup Value Field

Keyboard lookup entry occurs in this field. The two most common lookup formats are by phone (numeric) or name (alphabetical), selected automatically based on the first character typed. The background field color turns *red* if a typed entry does not exist. Pressing the **Enter** key with a red background invokes the auto-add new customer mode.

4 Lookup Results List

The list of incrementally selected customers is displayed here. Using the **Up/Down Arrow** keys scrolls the highlight up and down within the list for manual selection. List contents are automatically sorted in ascending order (top down) based on lookup type. For example, names start with the letter "A" and phone numbers begin with the number "1".

- **Add a New Customer Button**—Pressing this button forces the **CV** to appear to directly add a new customer without first performing a lookup. To avoid duplicate name entries, use this button only when it is absolutely known that the customer is new and has not previously been entered in the database.

5 Customer Summary Button

This button displays the name and phone of the currently selected customer. When pressed, it displays the **CV** for the displayed customer.

6 Profile Indicators

Provides detailed customer status information. Customer profile indicators are also found in the **VI**. This view is enhanced with explanations.

VIP (Very Important Customer)—Blue if active.
CC (Credit Card)—Green if **CCOF** active, red if expired.
A/R (Accounts Receivable)—Green if active, red if charge restricted.
RT (Route)—Green if active, displays assigned route
CK (Checks)—Green if OK to take checks, red if no OK.
DL (Drivers License)—Green if license valid, red if expired.

7 In Process/Ready Indicators

Displays current piece count, order count, and value for all in-process and ready orders. Also displayed is the most recent order date and number of days since the last visit.

8 Active Orders Tab

Lists all orders with order status for the selected customer. Orders are grouped together in color by status for ease of viewing. Double-clicking on a column heading forces list sorting by that column. This tab setting always remains at the last selected state. Highlighting an order activates the two buttons in the Active Orders tab:

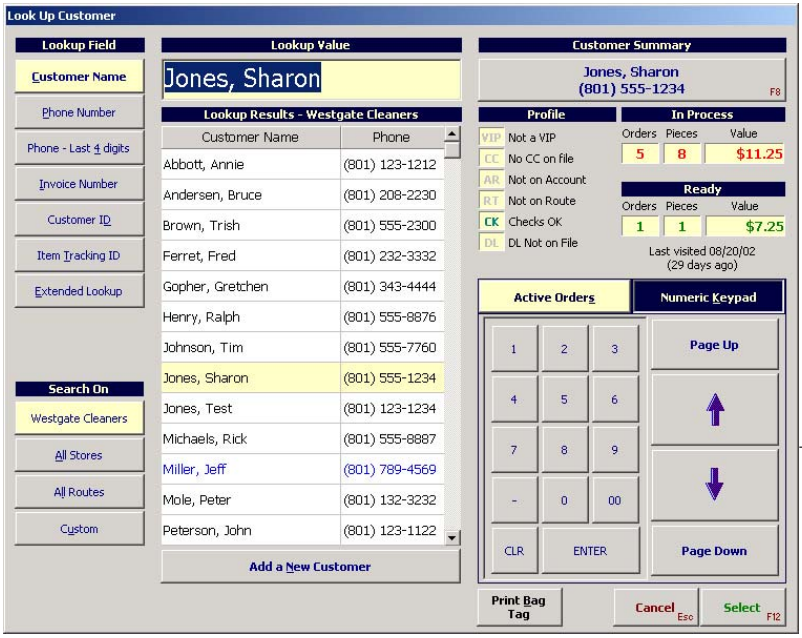
- **Order View Button**—Displays the Order View function for editing an order.
- **Redetail Button**—Opens the Detail view, placing the selected order in the **VI** in preparation for modifying an existing order. Redetailing opens an existing order in preparation for modification.

9 Numeric Keypad Tab

Pressing this tab toggles to a keypad, facilitating touch screen phone number lookup entry and customer list selection navigation. This tab always remains at the last selected state.

LAST SELECTED CUSTOMER

As a configured option, the system remembers the most recently selected customer. Upon entry to the **CL** view, the Lookup Value field displays the last selected customer. Pressing the **Select [F12]** button selects the displayed customer, bypassing the standard lookup procedure. This is useful when accessing the same customer repeatedly. This feature can also be deactivated under configuration control.



*Customer Lookup (***CL***) View—**Numeric Pad Tab***

LOOKUP-SELECT

Looking up by phone number or name is automatic and based on what you initially type. For example, typing an "A" highlights the **Customer Name** button for an alpha lookup. Typing a "5" highlights the **Phone Number** button for a numeric lookup.

The **Backspace** key removes typed entries one character at a time, while the **Enter** key accepts a typed entry. Lookup is incremental. This intuitive process narrows the search list beginning after the first three entered characters. For example, if the user enters "JON", the results list is narrowed to display all last names beginning with "JON". Adding an "E" further narrows the displayed list to the names beginning with "JONE". As the displayed results list narrows, the desired customer name becomes highlighted in yellow for selection. Pressing the select button selects the highlighted customer for further action. The **Up/Down Arrow** keys manually moves the highlight to any customer in the list for final selection.

LOOKUP-ADD-SELECT

If an entered match is not found, the lookup background value field color turns red. Pressing **Enter** at this point prompts to add this as a new customer. Selecting **Yes** displays the **CV** for entry of the new customer's last name, first name, phone number and address information, then allows new customer selection for continuation of the selected order processing step. The red background helps identify entered values to the user as new or not previously existing.

LOOKUP-MODIFY-SELECT

Pressing the **Customer** button for a selected customer displays the **CV**. From this view, any information can be changed. Changed information is updated only if the **OK** button is pressed. Press the **Cancel** button to exit back to the lookup view without saving changes.

LOOKUP FROM BARCODE SCAN

Scanning an existing barcoded invoice number bypasses the lookup process entirely and moves directly to the selected function.

- **Detailing a Quick Ticket**—Scanning a Quick ticket at **CL** during a Detail step passes the Quick ticket number to the Detail invoice number then immediately displays the Detail view in preparation for order mark-in. The **VI** contains a blank beginning invoice.
- **Re-Detailing a Detailed Invoice**—Scanning a Detailed invoice at **CL** during a Detail step immediately displays the Detail view in preparation for order re-Detail. The **VI** contains the original invoice. Re-Detailing an existing order is more efficient than the alternative; voiding the entire order then starting over.

Maintenance

From time to time a customer record will need to be updated. For example, you might desire to pre-enter many of your customers in advance of using SPOT for the first time or when a customer calls on the phone with a change in address. Customer maintenance operations such as these can be accomplished quickly as part of an order processing step as discussed above, or the more direct approach may be to use the **Customer Maintenance** utility found in the **Menu [F3]** function (see the *Menu Function* chapter for more information).

The customer maintenance utility has one other important feature, it displays all customers including inactive customers (an option available in the **CV** General tab). The **CL** view in all other areas of the system, such as Quick, Detail, Pickup, etc., lists only active customers.

Order Management

Order Production Overview

Quick Receive

Detail Receive

Racking Orders

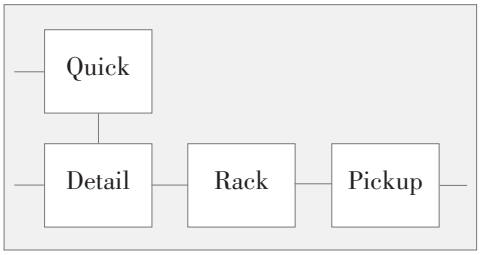
Order Pickup

Order Quoting

Merchandise Sales

Order Process Steps

*Order production steps are accessed via the Home Page (**HP**). A flexible, yet robust production management system offers a wide variety of configuration options, fine-tuning the system to your operational preferences and needs. In addition, two user-definable processing steps can be inserted between Detail and Pickup: predefined and scanned steps. The Quick Reference Guide chapter contains step-by-step "how to" processing instructions.*



Basic Order Processing Steps

Order Production Overview

Order production functions are accessed from the Home Page (**HP**). The **HP** also displays continually updated order production information such as problem alerts, recent transactions, production workflow, sales summaries, and statistical graphing. During order production, SPOT assigns each in-process order a Status indicator, which is automatically updated at each production step. Status indicators are used to automate production processes as well as inform the user of order progress. Barcodes are printed on all appropriate forms for enhanced order management accuracy and speed.

Each order production step view contains a rendering of the actual printed order invoice, called the Visual Invoice (**VI**). The visual invoice shows the mark-in detail for the selected order as well as a history of any modification, such as a void. The printed invoice contains only customer-pertinent information without watermarks to reduce potential confusion caused by production order changes. Access to individual functions can be **PIN** protected by activating the built-in Security system for increased employee traceability and accountability.

PRICING STRUCTURE

Price tables are predefined containing garment selection pricing. SPOT contains an editor allowing initial entry and maintenance of any price table. The editor allows the drycleaner to create customized pricing structures that are familiar to clerks. Any number of price tables can be created.

Different price tables can be assigned to selected customers. When a customer is selected for order mark-in, the associated price table for that customer is automatically selected, eliminating pricing errors. Predefining the order pricing structure increases mark-in speed, accuracy, and pricing consistency. Special pricing features, such as *Price & Describe* and *Price Later*, can be made active allowing added flexibility to the predefined pricing structure. The basic price structure uses the following elements listed in order of use:

- **Department**—The highest level of selection. Usually contains choices such as: *Drycleaning, Laundry, Household, and Leather*.
- **Category**—The next level of selection. For the selected department of Drycleaning, these choices might include: *Pants, Dress, Suit, Skirt, Vest, and Ties*.
- **Item**—The next level of selection and where the actual garment cleaning price is assigned. For the selected category of Dress, these choices might include: *Long, Formal, and Fancy*.

- **Modifiers**—An optional level of selection, modifiers are comprised of four definable tables, usually called: *Colors*, *Patterns*, *Fabric*, and *Brands*. Priced modifiers are available. Multiple colors can be selected.
- **Upcharges**—An optional level of selection, upcharges are item-specific selection lists containing descriptions and pricing for exceptions to item pricing. For the selected item of *Formal*, choices might include: *Lined*, *Unlined*, *Sequins*, *Beads*, and *Fur Collar*. Multiple upcharges can be selected. Upcharge price types include: *flat, +/- amount, +/- percentage, dimensional, and quantity* (i.e., upcharge per pleat).

Marking-in an order consists of selecting a Department, Category, Item, Modifiers, and Upcharges for each garment. By defining the price table for an elaborate mark-in, the process might include the following selections: *Dryclean*, *Pant*, *Jeans*, *Blue*, *Solid*, *Denim*, *Chaps*, *Cuffs*. For shirts it might include only: *Laundry, White*. Price table structures can be made to be small and streamlined, or large and complex as desired. Price table complexity increases result in longer mark-in times.

PRODUCTION STEPS

- **STEP 1: Receive Orders—**The **Quick [1]** button is optionally used to speed up the entry process during high-traffic times or when full order mark-in occurs at a location other than the front counter. The result of this step is a non-priced order with limited information such as Customer, Department, and number of Items. A bag ticket and customer claim check with a unique barcoded ticket number is also printed. Status = *Quicked*.

  Orders initially received using the Quick function must be subsequently marked-in using the **Detail [2]** button then scanning the bag ticket. Detail is a mandatory step that can be used directly, bypassing the Quick step altogether. The Detail step fully prices and describes received items. The result of this step is an automatically printed order invoice and claim check containing all necessary information needed to track, assemble, and sell the order. The printed invoice contains a unique barcoded invoice number. Status = *Detailed*.

  Price quotes are available using the **Quote [5]** button. This optional production step is the same as Detail, but without requiring initial customer selection. A quote can then easily be turned into a detailed invoice at the end of the quoting step. No Status is associated with this function, unless it is converted to a detailed order.

- **STEP 2: Store Completed Orders—**The **Rack [3]** button is used to assign completed orders to temporary storage such as conveyor, slick rail, or other location type. This production function can be entered when orders are ready for racking. Several location types can be defined to streamline the racking process. Racking can be performed either manually using keyboard entry or by barcode scanning. Barcode labels can be placed on conveyor links, minimizing errors during the racking process. Status = *Ready*.
- **STEP 3: Order Pickup—**Use the **Pickup [4]** button to sell orders to customers. The order Pickup view displays a list of all orders ready for pickup, eliminating the need for a visual file. Orders requiring modification prior to pickup can quickly be selected, viewed, and changed. Specialty order actions such as *Pickup Now Pay Later (PNP)* can easily be applied to selected orders. Selectable tender types are available, such as Cash, **CC**, **CCOF**, or On Account. An order *Pick List* automatically prints to enhance order retrieval. Status = *Sold*.

ORDER EXCEPTIONS

The order **Search [F2]** button provides a quick way to find and list orders selected by customer, order number, tag number, garment description, rack location, HSL, route, and predefined advanced filter type. This is an instant access work-in-process reporting utility. Several functions such as Alerts use this view to display order list results. The **Item View [F6]** button allows changes to garment-specific entries such as price, quantity, comments, modifiers, etc. The **Order View [F7]** button allows changes to entire orders such as adjustments, comments, discounts, coupons, etc. These functions are most commonly found on the Visual Invoice. Other tasks, such as changing orders incorrectly assigned to a customer, voiding orders, splitting an item from a larger order, and performing a redo are also available within Order View.

OTHER FUNCTIONS

The **Merchandise [6]** button creates a unique prepaid sales invoice selected by UPC barcode or SKU number. It is also available during the order Pickup process. The **Process Steps [7]** button allows access to any additional user-defined production steps.

TRACKING

SPOT provides tracking at both order and item level. Item-level tracking is made possible by barcoded Heat Seal Label (**HSL**) or demand permafiber tag printing. Each process step uses this unique identification number to track garments. Garment ID numbers can also be temporarily attached through the production cycle. RFID tags are an alternative method of identification where attachment issues permit.

INTELLIGENT SPLITTING

The optional and fully automatic intelligent invoice splitting feature eliminates the need to presort received garments. The result of intelligent invoice splitting is multiple printed invoices each with a unique invoice number. Intelligent splitting rules are independently configurable for the Quick and Detail production steps. Intelligent invoice splitting for either step can be deactivated altogether if desired. Received garments create multiple invoices or quick tickets automatically split across any combination of departments, pieces, and promised dates under configuration control. Once configured, invoices are created automatically according to defined splitting rules.

For example, assuming splitting is to occur by department and promised date with five pieces on each drycleaning invoice and eight pieces on each laundry invoice, randomly marking-in a total of 12 drycleaning garments and 12 laundry garments would result in the automatic creation of five total invoices with unique invoice numbers. There would be three unique drycleaning invoices and two unique laundry invoices. To prevent orphaned invoices (containing only one item), SPOT will automatically attempt to balance the last two invoices by splitting the total number of items between the two. If the promised date is changed on any of the above garments during the receive production step, a new invoice would have been created containing that garment.

Quick Splitting

While multiple quick tickets may be created, only a single claim check is printed for the customer that references all split orders. Each quick ticket then goes with the respective order group for detailing. Deactivating Quick splitting results in only one quick ticket generated containing all departments and piece counts plus a claim check.

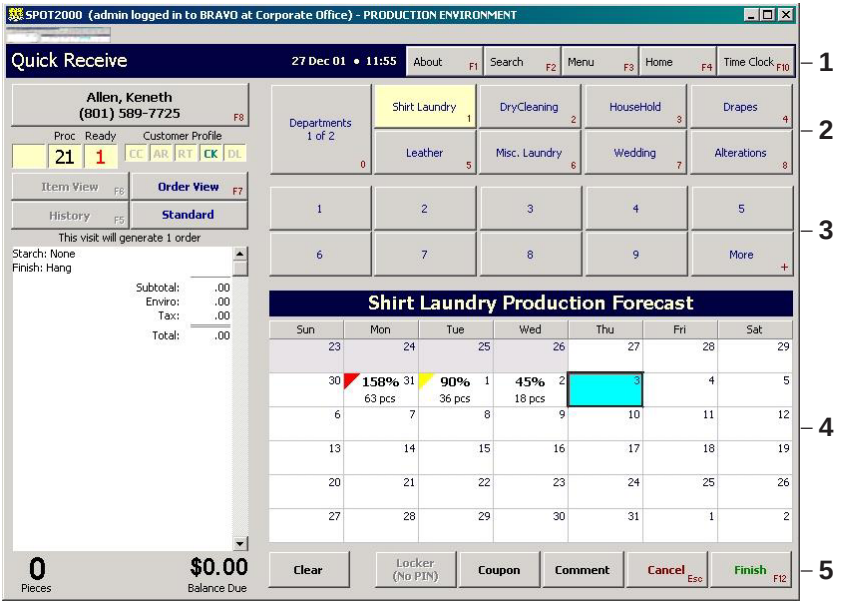
Detail Splitting

There are two options for the Detail process:

- **Automatic**—Follows the defined splitting rules.
- **Manual**—The *Split* button on the Detail view forces splitting to occur when pressed, deactivating automatic splitting for the current order only. Manual splitting lets the user define invoice splitting on a real-time basis (i.e., a vest remaining on an invoice with a jacket).

VISIT HISTORY

A series of invoices generated by invoice splitting is called a *Visit*. Orders are associated to the customer, so unlike a manual system, looking up the customer during an order Pickup displays all orders in process for that customer eliminating the need for a manual visual file.



Quick Receive View

Quick Receive

This function is accessed via the **HP Quick [1]** button. It generates a non-priced claim check for the customer and one for the Detailer. This optional step is used primarily at busy counter locations where the price, describe, and tagging occurs at a different stations within the store. Orders received with this step must be Detailed. The Quick step assigns a customer and invoice number to a printed "quick ticket" containing only department, item quantity, and promised date.

The **VI** displays progress during Quick order entry. Both comments and coupons can be added during the quick receive process. A real-time production forecasting calendar shows the automatically calculated order promised day (highlighted in blue) based on price table configuration. Scheduled production is calculated and displayed by day.

QUICK VIEW

1 Function Buttons

Search [F2]—Order search function.
Menu [F3]—Lesser used functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

2 Department Buttons

The two rows of four physical department buttons are numbered [1] - [8] for keyboard selection. Both the names and listing order are user-definable for these eight buttons. Multiple groups of eight buttons are accessible by pressing the large **Department [0]** button to the left. This button also displays the currently selected group of physical department buttons ("1 of 2" in this view).

3 Piece Count Buttons

Buttons "1 - 9" provide item quantity for the previously selected department. The **More** button displays a numeric pad dialog used for entry of quantities greater than nine.

4 Production Forecast Calender

The forecaster is used to indicate current production line utilization by promised day of the week. In centralized systems, it keeps clerks in remote stores informed of pending production capacity problems at the central plant. This user-definable feature can handle any number of production lines—drycleaning and laundry are examples. Piece counts and percentage of production line utilization are displayed in the calendar upon department selection.

Colored level warning flags help the user recognize pending over capacity problems. The promised date calculator automatically determines the due date, but the forecaster can automatically alter that date if the production line is over capacity. Manually selecting a different day forces the promised date to that day, overriding the automatic day setting. Warning levels and production capacities are user definable.

- Yellow triangle flag warns of nearing line capacity.
- Red triangle flag displays when maximum capacity is reached.
- Blue square highlights the selected promised date for an order.

5 Process Buttons

Process buttons are order-level functions typically needed during the Quick process. **Coupon** and **Comment** functions are tabs in the **Order View [F7]** button in the **VI** and are available as separate buttons in the Quick view for convenience. Selecting one of these buttons displays the Order View with the appropriate tab preselected. See the *Exception Handling* chapter for more information on Item and Order Views.

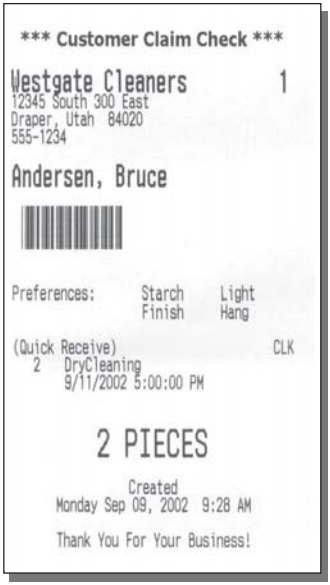
- **Clear**—Clears the current contents of the **VI** to start over.
- **Locker**—Specifies customer pickup from on-premises locker.
- **Coupon**—Allows coupon selection for the current entry.
- **Comment**—Allows a comment to be added to the current entry.
- **Cancel [Esc]**—Exits the function without completion.
- **Finish [F12]**—Completes the function.

CLAIM CHECK PRINTING

The result of a quick received order is usually two claim checks, one for the customer and a store copy for the Detailer (unless intelligent invoice splitting is active). The barcoded invoice number on the claim check can be scanned in the **CL** view to automatically access the Detail view with order and customer preselected. Using the printed barcode this way eliminates the manual lookup process. The Detail invoice number is retained from the Quick ticket. To retain the invoice number during a manual search, the system will display a list of open Quick tickets for selection. The suggested printer for this process is our standard thermal printer, chosen for its unparalleled flexibility.

Support for Drive-up Windows

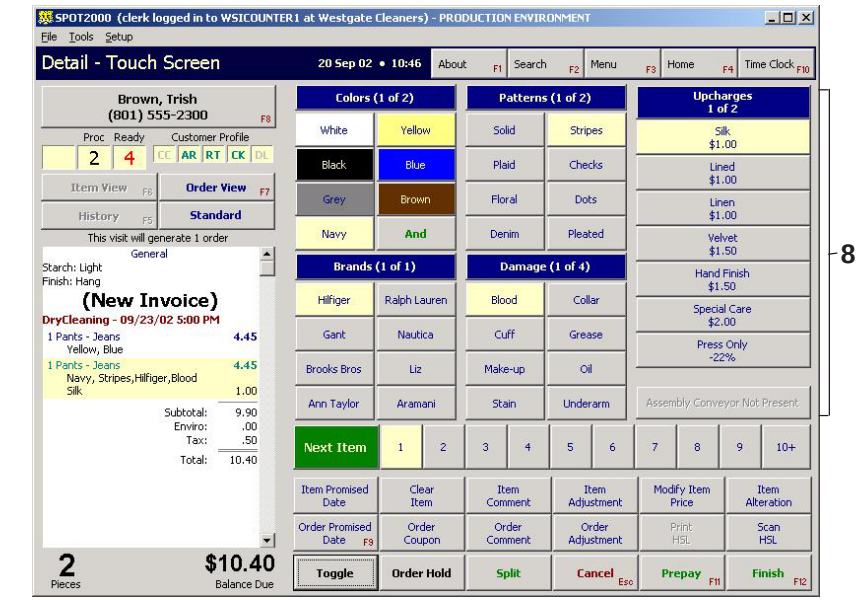
SPOT supports the creation of optional prebarcoded manual tickets with perforated claim checks, printed in advance for drive-up window use. Each preprinted ticket contains a preassigned order number and defined areas indicating order information such as name, phone number, starch, finish, promised date, special instructions, etc. At the customer's car, the clerk enters the customer name and phone number, quickly circles dropoff order information on the ticket, then tears off the barcoded claim check at the bottom for the customer. During the Detail step, scanning the ticket (associated with the received garments) automatically prompts for **CL** since the system recognizes this special ticket as having a preassigned number only. The order is then detailed using the contents of the ticket to indicate circled preferences. Drive-up ticket format can be customized under configuration control.



Sample 3" Customer Quick Ticket

Sample 4" Manual Drive-Up Quick Ticket with bottom Perforated Claim Check

*Touch Screen Order Detail View—**Item Selection***



*Touch Screen Order Detail View—**Modifier Selection***

Detail Receive

This function is accessed by selecting the **HP** Detail [2] button. There are two distinct Detail views designed to follow clerk **PIN** access:

- **Touch Screen View**—Designed for use with a touch screen, this is full featured and is highly intuitive to use.
- **Keyboard View**—Designed for 10-key entry, it has fewer features and uses numeric sequence entry for fast detailing.

The use of either of these is based strictly on personal preference. The touch screen method is the most commonly used and is discussed next. The keyboard method is discussed later.

TOUCH SCREEN DETAILING

This method consists of two views, the *Item Selection* view and the *Modifier Selection* view. Once item selection is complete, the Modifier view automatically replaces the Item view. The printed invoice generated by this step contains price and item description information used to reassemble and sell the order. The **VI** displays order entry progress as it occurs.

To help organize complex pricing schemes, SPOT uses the following elements to structure the Detail process:

Item Selection view
- Department
- Category
- Item (where pricing occurs)

Modifier Selection view
- **Modifiers**—Indicates garment color, pattern, brand, fabric, etc.
- **Upcharges**—Selects adjustments to item.

ITEM SELECTION VIEW

1 Function Buttons

Search [F2]—Order search function.
Menu [F3]—Lesser used functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

2 Item Selection Buttons

These buttons are used in sequential order to define an item. The buttons in each group are user-definable and follow button naming assignments made in price table configuration. Both *Price Later* and *Price & Describe* functions are supported as configuration options (discussed later). Once the item is defined, the Modifier view is automatically displayed for selection of modifiers and upcharges.

- **Department Buttons**—One row of four physical Department buttons are available for selection. Both the names and listing order are user definable for all four displayed buttons. Multiple groups of four additional buttons are accessible by pressing the large **Dept** button to the left.
- **Category Buttons**—Two rows of four physical Category buttons are available for selection. Both the names and listing order are user definable for all eight displayed buttons. Multiple groups of eight additional buttons are accessible by pressing the large **Categories** button to the left. Note that under configuration control, the Category section can be eliminated and replaced with Item buttons, effectively creating a two-step Detail process with 24 Item buttons.
- **Item Buttons**—Four rows of four physical Item buttons are available for selection. Both the names and listing order are user definable for all 16 displayed buttons. Multiple groups of eight additional buttons are accessible by pressing the large **Items** button to the left.

3 Next Item Button

After an item is completely priced and described, pressing this button tells the system to continue with a new item for the same order. Note that the Detail function remembers the last department selected and assumes the next garment is of the same department. A different department can be selected if needed.

4 Piece Count Buttons

Buttons "1 - 9" select item quantity for the previously selected department. The **10+** button displays a numeric pad dialog for entry of quantities greater than nine. A quantity of "1" piece is always selected by default unless changed by selecting a different piece count.

5 Item Change Buttons

These are item-level functions typically needed during the Detail process. These functions are only active when an item is selected in the **VI** and are available in both Detail views. These functions are accessible from the **VI Item View [F6]** button and brought out as separate buttons in the Detail view for convenience (see the *Exception Handling* chapter).

- **Item Promised Date**—Displays the same Production Forecast utility as described in the Quick receive view, but for Items (intelligent invoice split mode). For space considerations, the **Item Promised Date** button displays a production forecast dialog when needed.
- **Clear Item Button**—Clears current Item selections to start over.
- **Item Comment Button**—Allows a Comment to be added to an item.
- **Item Adjustment Button**—Allows Item price adjustments.
- **Modify Item Price Button**—Allows a price change to the Item.
- **Item Alteration Button**—Adds an alteration to the Item without changing the piece count (alteration choices must be predefined).

6 Order Change Buttons

These are order-level functions typically needed during the Detail process. These buttons are active after at least one item has been fully entered and is available in the Detail view. These functions are also accessible as tabs in the **Order View [F7]** button of the **VI** and are brought out as separate buttons in the Detail view for convenience (see *Exception Handling* chapter).

- **Order Promised Date**—Displays the same Production Forecast utility as described in the Quick receive view. For space considerations however, the **Order Promised Date [F9]** button displays a production forecast dialog when needed.
- **Order Coupon**—Adds a Coupon to an order.
- **Order Comment**—Adds a Comment to an order.
- **Order Adjustment**—Allows order price adjustments to be made.
- **Print HSL**—Prints a barcoded Heat Seal Label (HSL).
- **Scan HSL**—Allows order entry by scanning a garment with an attached Heat Seal Label.

7 Process Buttons

- **Toggle**—Toggles between Item and Modifiers selection views.
- **Order Hold**—Places an order on hold and returns to the **HP**. The **Detail [2]** button on the **HP** shows the word "Hold" indicating an order is on hold. Any other process function can be selected from the **HP**, such as order Pickup. Pressing the **Detail-Hold [2]** button from **HP** returns to the in-process Detail order.
- **Split**—Forces invoice split, overriding automatic splitting.
- **Cancel [Esc]**—Exits the function without completion.
- **Prepay**—Completes the detail process and forces the order Pickup view to appear for prepayment.
- **Finish [F12]**—Completes the detail process, allowing the order to be paid for at the time of order pickup.

MODIFIER SELECTION VIEW

This is the second of two views in the Detail process and is used to select optional Item Modifiers (based on user-defined pricing setup). If configured, an item might require the selection of additional Modifiers (Modifiers are typically not needed with shirt laundry, for example), this view then appears. The **VI** displays continuous order entry progress of Modifiers and Upcharges.

8 Modifier and Upcharge Buttons

Four Modifier lists and one Upcharge list provide additional adjustments for a selected item. These lists can be used in any order, individually, or not used at all. The name of each Modifier list can be uniquely named; however, the names shown are the most common for drycleaners. The contents and position of buttons in each list are also user-definable. Pressing the blue tab associated with each list causes button definitions to cycle to the next set of choices, thereby extending the total available button count for each group. Both Colors and Upcharge groups have special characteristics as indicated below. All lists below are user-definable.

- **Color**—Assigns color Modifiers to the selected Item. Multiple colors are allowed. Each press of a color creates a unique line entry in the **VI** with that color. For more than one color to be assigned to a single Item, use the **And** button found in the lower right position. For example, the entry sequence **Red–And–Green–And–Blue** would show all three colors descriptors for the selected Item. Whereas, leaving the **And** button out of the sequence would yield three separate line entries, all with a single color assigned for the same Item.
- **Pattern**—Assigns a Pattern modifier to the selected Item. Only one Pattern type is allowed.
- **Brand**—Assigns a Brand modifier to the selected Item. Only one Brand type is allowed.
- **Material**—Assigns a Fabric modifier to the selected Item. Only one Fabric type is allowed.
- **Upcharge**—Assigns Upcharge modifiers to the selected Item. Multiple Upcharges are allowed. Each press of an Upcharge button creates a unique line entry in the **VI** containing that Upcharge. Upcharges can be configured to display an additional list (as indicated on the button by the word *List*) for further Upcharge itemization of the Upcharge type. If no list exists, the selected Upcharge description and amount is placed directly on the **VI**.

Keyboard Order Detail View

KEYBOARD DETAILING

This single-view detailing method uses the 10-key numeric pad for Detail entry. Each choice in each list is numbered for selection from the 10-key pad. Upon initial entry to this view (automatically accessed by clerk **PIN** assignment), all lists are blank except the Department. Selecting a department, displays the Category list for that department. Selecting a category, displays the Item list for that category. This process continues until selections have been made from top-left to bottom-right.

Lists are defined in the price table and are reproduced in this window automatically numbered. All lists allow only one choice selection except Upcharges and Colors, which allow multiple selections. Special numeric pad key commands are used to navigate lists:

- **1-9 keys**—List choice selection.
- **Enter key**—Move forward to the next list.
- **+ key**—Open Upcharge and Color for multiple choices.
- **Back Arrow key**—Backup one list to the left.
- **0 key**—Switches to next list of choices within any list.
- *** key**—Clear all selections and start over at Department.

LIKE ITEM CONSOLIDATION

When like Items are entered out of sequence during detailing, they are automatically consolidated to a single line in the printed invoice and **VI** to avoid confusion. Item quantity is changed reflecting the new quantity.

QUICK TO DETAIL NUMBER LINKAGE

If an order was initially received via the Quick process step, the contents of the original Quick entry history is retained as permanent record for the order and displayed in the **VI**. For a Quick to be linked to the subsequent Detail for the same order, the invoice numbers must be the same. To ensure that a prior Quick ticket properly passes its invoice number (usually barcoded) down during the Detail process step (for the same order only), the system has built-in safeguards.

- **Detailing by Quick Invoice Number**—This is the preferred method since it is fast and guarantees assignment of the original Quick ticket number to the subsequently Detailed invoice. With this method, at Customer Lookup (**CL**) the Quick ticket barcode number is scanned rather than performing a standard customer lookup by name or phone number entry. SPOT recognizes the invoice number and automatically displays the Detail view, placing customer and Quick information in the **VI**. The detailing process proceeds as normal retaining the original quick ticket number for the newly detailed invoice.
- **Detailing by Standard Lookup**—If a standard Customer Lookup (**CL**) is performed using customer name or phone number and existing Quick ticket(s) exist for that customer, the system must then resolve which Quick ticket will be passed on to the subsequently Detailed order. In this case, a dialog appears showing all outstanding Quick tickets with enough detail to select the proper one. Note that if a *New Invoice* is selected from this dialog, an orphan Quick will result. Orphan Quick tickets have no corresponding Detail invoices and should be deleted. The system Alerts in **HP** will indicate potential orphaned Quicks (quicked but not detailed).

REDETAIL EXISTING ORDERS

Existing detailed orders can be modified easily by redetailing. This mode displays the Detail view in preparation for order redetail. The **VI** contains the original invoice. Redetailing an existing order is more efficient than the alternative; voiding the entire order then starting over. There are two ways to redetail an existing order:

- **Redetail Button**—From the *Active Orders* tab in the **CL** view, highlight any order with a Detailed status and press the Redetail button.
- **Scan a Detailed Order**—Select the Detail [2] button and scan an existing detailed invoice during **CL**.

PRICING OPTIONS

- **Price & Describe**—Allows for manual entry of Item amount and description. When configured, an Item button of this name is displayed for selection.
- **Price Later**—Normally used for alterations, wedding dresses, and certain wholesale work, this function is activated by Item selection under configuration control. During detailing, a "**~**" is placed in the invoice amount field and a *"Price Later"* watermark is shown in the **VI.** Pricing occurs during a subsequent step, such as *Rack* or definable *Process Step*.

WARNINGS

The system automatically provides several Detail warnings:

- **Item Quantity Mismatch**—As a safety precaution, the system will warn if any mismatch in Item count occurs between the Quick and Detail process. For example, three drycleaning Items were indicated during Quick receive, yet only two Items were actually detailed. A warning dialog appears, notifying the detailing clerk of the situation and allowing the ability to resolve the mismatch.
- **Order Ready**—At the end of the Detail process, if the selected customer has orders ready for pickup, the system will automatically display an Order Ready dialog. If the customer is present, simply elect to pick up the orders from the dialog and the system will display the order Pickup view with all *Ready* orders marked for pickup. Otherwise, the **HP** is displayed. This warning can be deactivated under configuration control.
- **Redetail Split**—When redetailing an order with newly added Items, if garment tags have already been demand printed during Detail, a warning will notify that a new invoice and demand tags will be printed. Deleting demand tags associated with the order prior to redetailing avoids this warning.
- **Lot Change**—If lot tracking is active for the selected department and a new lot is about to be created, a warning will appear with current lot information and prompting to change paper tag color stock.

PROMISED DATE CALCULATOR

The order promised date calculator automatically sets the due date and time for each order created. Based on your production schedules, calculated promised dates are defined by department and can be easily overridden during order creation or editing. The promised date calculator can also be forced to preassign a fixed promised date until changed or, always prompt for user selection during each order Detail session.

FORMS PRINTING

The result of a Detail step is a printed invoice and/or garment tags.

Invoices

The layout of the printed invoice can be modified using an internal editor. A predefined number of invoice copies can be printed for any Department. The printer of choice for this process is the thermal printer.

- **Claim Checks**—If an order is Quick received and a claim check printed, the subsequent Detail invoice will not generate an additional claim check unless designated to do so. But, if Quick is bypassed, the resulting Detail invoice will print a claim check.
- **Intelligent Splitting**—An optional invoice splitting feature eliminates the need to presort received garments before mark-in. Orders are detailed as received, letting the system create multiple invoices with unique numbers, split automatically across departments, promised dates, and number of pieces per ticket. This feature is active unless turned off.

Tag Printing

When configured, demand printed tags will print automatically at the end of the Detail step. Demand tags are printed at the same time as a printed invoice. The printer of choice for demand printed tags is a dot matrix printer with an indelible ink cartridge. Note that preprinted tags are also supported by SPOT and requires keyboard number entry at the end of the Detail step. Selection between demand printing and preprinted entry is configurable by department.

HSL Printing

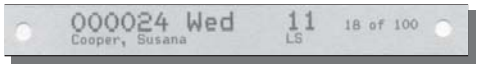
When configured, Heat Seal Labels (HSL) will print automatically at the end of the Detail step. HSL labels are printed at the same time as a printed invoice and are normally used in place of preprinted paper or demand printed garment tags. Since HSL tracking can be selected by Department, a combination of HSL and paper tagging can be configured.

3" Thermal Invoice

4" Invoice with Perforated Claim Check

3" Demand Garment Tag

Heat Seal Label



4" Fanfold Demand Garment Tag

Heat Seal Label

DETAIL ENTRY METHOD SELECTION

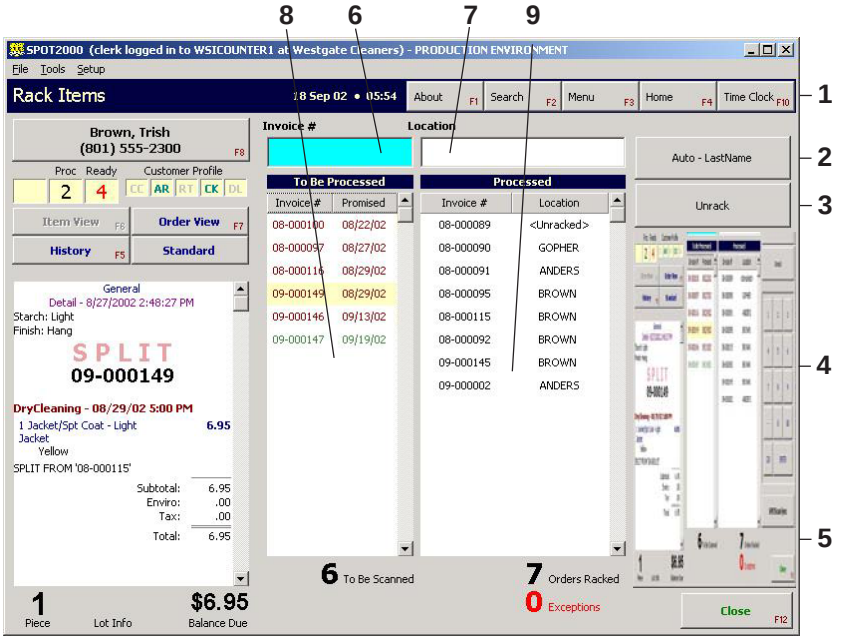
SPOT supports two Detail entry methods, touch screen and keyboard. The method selected follows the user **PIN** entry and is defined by configuration option during user setup. For example, one user can be set for keyboard detailing, while all other users are set for touch screen detailing. The touch screen Detail method is the recommended entry method since it has expanded functionality and is easier to learn and use. The following are important considerations:

Keyboard

Commonly used by those familiar with the SPOT Classic detailing method. This method commonly uses numeric sequences entered from the numeric pad for detailing, (i.e., 1-3-2 could mean [1]Dryclean, [3]Pants, [2]Jeans). While this method is fast once learned, it does have a fairly long learning curve. Detailing allows only two user-defined descriptors plus a single upcharge table list.

Touch screen

This more robust detailing method is more intuitive, requiring less time to learn. It is also very fast to use. The drawback is that it requires the use of a more expensive touch screen to obtain the maximum operational benefit. A cheaper mouse can be used, but is slower and not recommended if fast detailing is required. It also contains four user-defined descriptors and an upcharge table list with upcharge sub-list capability.



Order Racking View

Racking Orders

This view is accessed via the **HP Rack [3]** button and used to assign completed orders to conveyor or slick rail storage locations. As each order is scanned (or manually entered), that order moves from the *To Be Processed* list to the *Processed* list. When all orders have been scanned, the *To Be Processed* list should be empty, a visual reminder that all orders ready for this step have been processed. Orders scanned at this step will have a *Ready* status. Racking is an important step since the *Ready* order status is used to automatically select orders ready for pickup as well as for work-in-process reporting.

RACK VIEW

1 Function Buttons

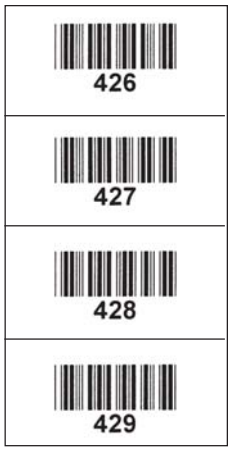
Search [F2]—Order search function.
Menu [F3]—Lesser used functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

2 Rack Location Button

This button allows quick selection between the *Manual* mode (for conveyors) and multiple *Automatic* modes. Manual racking requires two steps—sequential input of both invoice and rack number. Automatic racking requires input of the invoice number only, using SPOT customer database information to fill in the location field automatically. Automatic types are typically slick rail or shelf oriented. Any combination of manual and automatic racking types can be user-defined for selection during a racking session.

- **Manual Mode**—As invoices are scanned, SPOT prompts the user for a conveyor location. This can be entered by typing manually or scanning a barcoded conveyor label (available from SPOT Business Systems and shown below). Multiple conveyors can be numbered with different schemes depending on user preference. For example, the links of three conveyors could be numbered using alphanumeric labels with each conveyor having a unique alpha character, such as A001–A100 (first conveyor), B001–B100 (second conveyor), and C001–C100 (third conveyor). An alternative method would use numeric only, such as 001–100 (first conveyor), 101–200 (second conveyor), and 201–300 (third conveyor). Conveyor labels are made of durable vinyl with self-adhesive backs and are available in sets of 100, 250, and 500 with A, B, C, and D alpha prefixes or no prefix. It is recommended that only links be barcoded and not individual slots.

Alpha-Numeric Adhesive Peel-off Conveyor Labels



Numeric-Only Adhesive Peel-off Conveyor Labels

- **Automatic Mode**—Touching the location button toggles from manual mode to one of several automatic types. For example, the *Auto-Last Name* places the first six characters of the last name in the *Location* column. When an invoice number is scanned, the location column automatically displays an abbreviated customer's last name as the location description. This is very useful for some slick rail racking methods. Other choices include the last two digits of the customer phone number or even a predefined specific location such as *Shelf* or *Long Rail*.

3 Unrack Button

Allows a selected order to be unracked, effectively reversing the racking process in the event of an entry mistake. Press the **Unrack** button, then enter the invoice number to be unracked. Unracked orders appear in the list with the word "<*Unracked*>."

4 Numeric Pad

This pad enhances manual entry using a touch screen or can be used when a barcode scanner is not available.

5 SPOTScan Transfer Buttons

These buttons initiate the transfer of data to/from the SPOT Business Systems portable cordless scanner, *SPOTscan*. This is an industrial-grade device with a built-in laser scanner for use in areas where a corded barcode reader is not practical (see *SPOTscan Operation* chapter). *SPOTscan* allows for off-line order *Racking*, *Physical Inventory*, *Process Step* tracking, and *Ready Order Backup* (*Racking* and *Ready Order Backup* transfers are initiated from the *Rack* view).

6 Invoice # Entry

This is the entry display field for racked invoice numbers. Invoice numbers can be entered via keyboard, touch pad, or barcode scanning.

7 Location Entry

This is the entry display field of the location or rack number. This number can be either typed-in or barcode scanned.

8 To Be Processed List

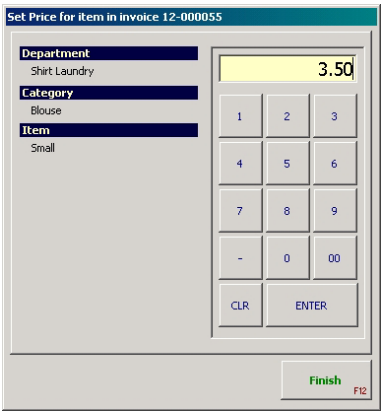
This list contains all orders ready to be racked. When the Rack view is first entered, all detailed orders in process appear in the *To Be Processed* list. A single-click on an order number in this list forces the contents of the order to be displayed in the **VI**. Red entries are late to racking, while green entries are on time. Double-clicking on the order is the same as entering the invoice number and pressing **Enter**.

9 Processed List

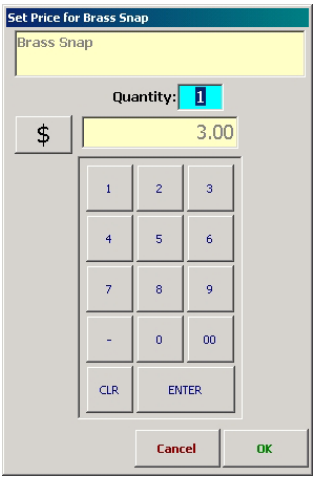
This list contains racked orders that now have a status of *Ready*. The current number of racked orders and order exceptions are contained in this list as indicated at the bottom. Orders in this list are immediately logged as racked by the system. Exiting out of the racking function to perform other tasks can occur any time. Upon return to the Rack view, the list is empty, awaiting racking of new orders.

PRICE LATER AND QUANTITY DIALOGS

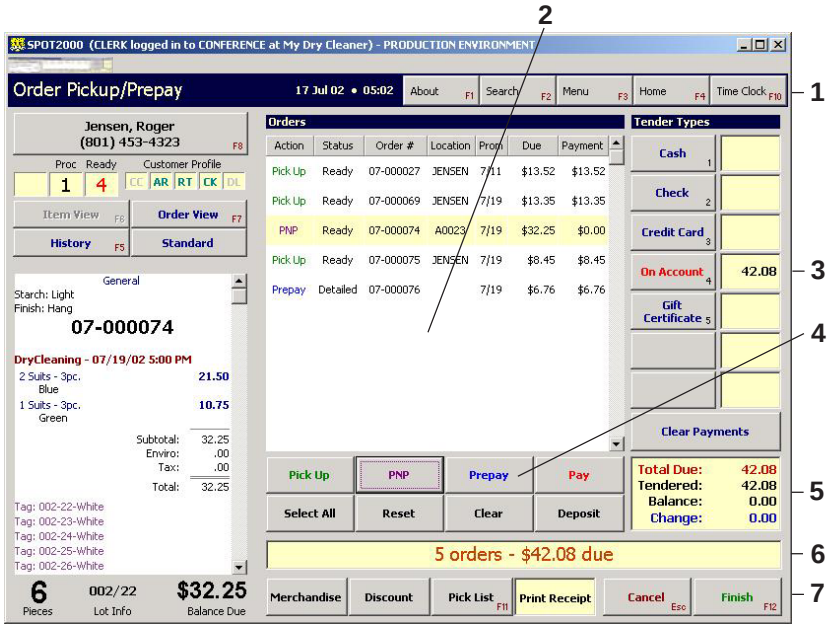
Price table configuration allows order prices to be changed at a step different than at the Detail step and called a *Price Later* order. Normally, this feature is used for alterations where the actual cost is not known until the garment returns from the tailor. *Price Later* orders encountered during the Rack function force a price adjustment dialog to be raised for manual price entry. A quantity dialog may also appear prompting for a count by which to multiply the Item price. Orders not priced at the Rack step are forced to be priced at Pickup.



*Rack Dialog—**Price Later***



*Rack Dialog—**Quantity***



Order Pickup View

Order Pickup

This function is accessed via the **HP Pickup [4]** button and used at the counter when the customer returns to the store to pickup their finished orders. It also handles payment transactions via a cash drawer and then closes the active order. This step incorporates all the flexibility needed to handle the most difficult order pickups with ease. The **VI** provides a way to view and edit an order requiring a change or when selecting an order containing a special garment at the request of a customer. Tender Type buttons allow quick selection of payment type. SPOT also supports **CC**, **A/R**, and user-definable tender types. Highly optimized, a typical pickup transaction of several orders requires as few as three button presses to complete.

PICKUP VIEW

1 Function Buttons

Search [F2]—Order search function.
Menu [F3]—Lesser used functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

2 Orders List

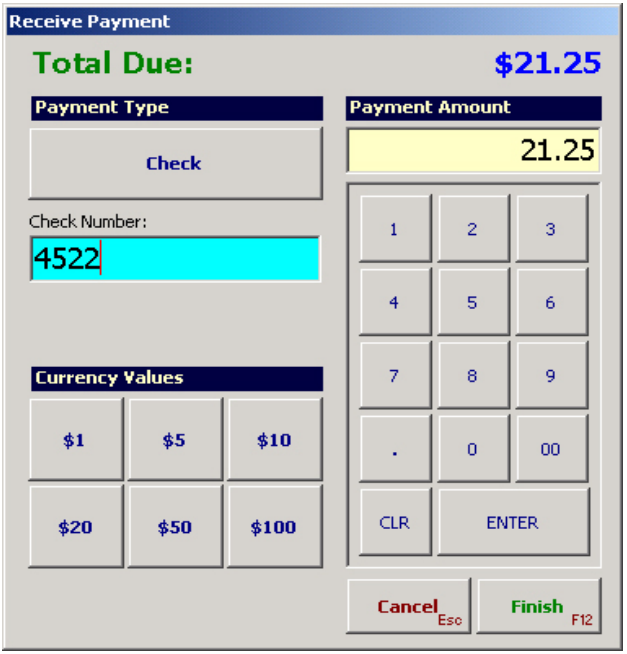
When first entered, all *Ready* orders for the selected customer are automatically checkmarked and added to the order pickup *Due* column. Detailed orders appear for reference, but must be manually checkmarked for pickup to avoid accidental marking of orders not ready. Highlighting an order in this list displays the contents of that order in the **VI** and selects it for potential change via the *Action* buttons (described later). An amount difference between the *Due* and *Payment* fields is the result of a partial order prepayment or deposit. These two field values will normally be the same.

3 Tender Types

For the most part, tender types are automated. Each tender button has an associated *tender amount display field* showing the amount tendered. Selecting a tender type (Cash, Check, **CC**) places the *Total Due* amount in the respected tender amount display field in preparation for completion. The exception to this is the **On Account** button, which displays the *Total Due* amount automatically in preparation for posting the charge on account. This occurs only if the selected customer has been previously established as a charge account customer, otherwise the button is blank (*On Account* does not appear) and has no function. The **Finish [F12]** button completes the order pickup transaction as indicated from tender type selection.

Multiple tender types can also be selected. For example, for a $20.85 order, $10.00 could be paid by cash and the balance paid by check or **CC**. This is handled by selecting the first tender type and applying only a partial amount. The system keeps track of the unpaid balance and attempts to apply this balance on the next selected tender type. Partial amounts entered in a tender amount display field forces the balance to be applied on the next tender type, and so on. The system will not allow a pickup to be completed unless the *Total Due* has been fully resolved to one or more tender types *(Tendered:* amount field equals the *Total Due:* field).

- **Cash Button**—Selects the cash dialog for payment. The cash *Receive Payment* dialog requires an amount to be manually entered since the exact amount of tendered cash is unknown. *Currency Values* selection buttons make large bill selection (the most common form of payment) very easy. Each pressed value button adds to the previous. For example, for a *Total Due* of $26.43, pressing the $20 and $10 value button will show a *Payment Amount* of $30 given by the customer with two paper notes. Of course, if an exact amount is given, that amount can be entered from the numeric pad directly. The *Payment Type* button selects a different tender.



Receive Payment Dialog

- **Check Button**—Selects the check dialog for payment. The check *Receive Payment* dialog is displayed with the *Payment Amount* displaying the exact amount automatically since payment in full is normal for check payments. Manual entry is also allowed using the numeric pad. A configuration option is available to force check number entry. This number is then used during the nightly closeout session to reconcile checks and provide an automatically printed bank deposit slip. The *Payment Type* button selects a different tender.
- **Credit Card Button**—Selects the **CC** dialog for payment. If the optional payment processing software is used, the dialog prompts with **CC** number Expiration date. If the optional payment processing software is not used, the dialog prompts only for an amount and assumes the transaction is being handled through a non-SPOT connected bank **CC** terminal. If the customer has a Visa **CCOF**, this tender button will automatically display *"Visa 1234"*, where 1234 is the last four digits of the credit card on file for reference. The *Payment Type* button selects a different tender.

- **On Account Button**—Charges to an **A/R** account and is only active if the customer has been previously configured as a charge customer. The tender amount display field automatically contains the account posting total in preparation for pickup completion.
- **Blank Tender Buttons**—Reserved for future tender types.
- **Clear Payments Button**—Clears all tender selections and amounts. Press this button for tender type reselection.

4 Order Action Buttons

To set the action for one or more orders, simply highlight the desired order(s) and press the appropriate *Action* button. To select more than one order, use the conventional Windows method of holding down the Ctrl key and clicking on several orders, or holding down the Shift key and clicking on the top and bottom orders to select a range. On a touch screen, multiple selections can be made by wiping the finger over the range of orders. If the *Action* button chosen is not a valid action for one or more of the selected orders, the *Action* column will not change state; otherwise, the *Action* column will be populated with the notation of the selected action. During initial entry into the Pickup view, orders are automatically flagged with an action as indicated below.

- **Pick Up**—Marks selected order(s) action as *Pick Up* and adds the *Payment* amount to the *Total Due* field (located below tender types).
- **PNP** (Picked up, Not Paid)—Marks selected order(s) action as *PNP*. Orders are picked up and then paid for on a subsequent visit. Note that this button is controlled by a security setting allowing selective clerk access. *PNP* orders are not posted to **A/R** until pickup occurs using the *Pick Up* action button.
- **Prepay**—Marks selected detailed order(s) action as *Prepay* and adds the *Payment* amount to the *Total Due*. Prepaid orders picked up at a later date show "0.00" amount due.
- **Pay**—Marks selected order(s) action as *Pay* and adds the *Payment* amount to the *Total Due*. These are typically PNP, **CC** Declined or Returned Check orders that have already been picked up but not paid. Note that this button is inactive unless unpaid orders (of the type just described) appear in the list.
- **Select All**—Selects/deselects all orders in the list.
- **Reset**—Causes the Pickup view to reset actions to the state when first entered.
- **Clear**—Clears an action for the highlighted order(s).
- **Deposit**—Allows a partial payment deposit to be applied to a highlighted order marked as *Prepay* or *Pay*. Either a flat dollar or percentage amount can be selected. Price table setup now allows forced deposits by item as indicated in the *Visual Invoice* view.

5 Transaction Summary Display

- **Total Due**—A sum of the order list Due column for selected orders.
- **Tendered**—The total amount received for all selected tender types (payment types).
- **Balance**—Shows amount of difference in the two fields above.
- **Change**—Indicates the total amount of any change due the to customer.

6 Pickup Status Display

The total number of orders flagged for action and their *Balance* due is displayed here. This area is also where credit card processing messages are shown.

7 Process Buttons

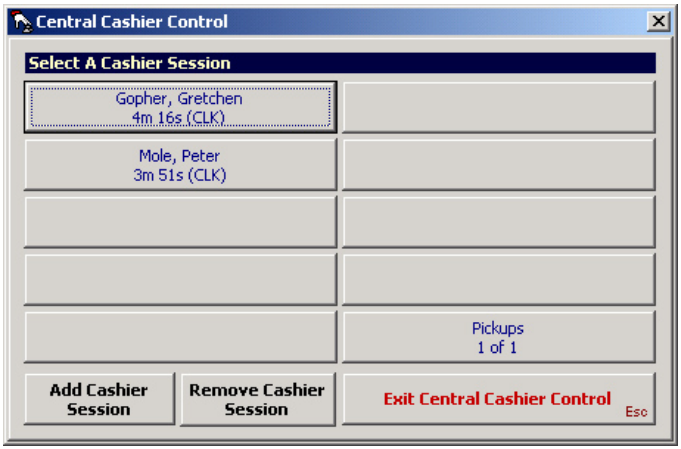
- **Merchandise Button**—Allows for merchandise to be sold during the order pickup session. Items to be sold must be configuration prior to use and are based on SKU/UPC codes. Merchandise sales are, by default, prepaid orders and create a separate invoice that is always automatically closed at the end of the payment session.
- **Discount Button**—Used when a percentage discount across all selected invoices is required. The discount is automatically applied with the amount of the invoice adjustment noted appropriately. This button can be **PIN** protected to control clerk access.
- **Pick List Button**—Prints a list of conveyor rack locations for the selected orders.
- **Print Receipt Button**—Allows the clerk to override the *Workstation Settings* > *Cashier Settings* > *Print Customer Receipt* setting. If depressed, this button forces customer receipts to automatically print at the end of the Pickup operation. If not depressed, the above-mentioned workstation setting governs whether a receipt is printed or not. The state of this button is reset to deselected for subsequent order pickups.
- **Cancel [Esc]**—Exits the function without completion.
- **Finish [F12]**—Opens the cash drawer, optionally prints a receipt, then closes order(s) and changes order(s) status to *Sold*.

CASH DRAWER SUPPORT

During the order pickup process, a cash drawer (if connected) will automatically open to accept amounts paid and tender change due. A configurable dialog view provides a variable length timer for *change-due* viewing as well as a breakdown of change due by denomination. At timeout, the order is automatically completed and control returned to the **HP**.

SPOT provides cash drawer support on a per workstation or per clerk basis with varying levels of security to suit the store owner. Up to two cash drawers can be attached to each workstation and assigned to individual clerks if desired.

There are two front slots on SPOT Business Systems supplied cash drawers. These are used to deposit **CC** receipts and checks for exact amount transactions. SPOT knows when to open the drawer for change, further enhancing overall cash control and security.



*Order Pickup View—**Central Cashiering Dialog***

CENTRAL CASHIERING

SPOT is designed to handle high-volume order pickup efficiently while tightly managing cash received. This is accomplished using the central cashiering feature. Multiple terminals at the front counter are used to identify the customer, print a pick list, retrieve orders, then place them at the central cashiering station. A single clerk at the cashiering station then performs the actual order pickup and tender functions.

Orders to be paid for are queued on the cashiering station and appear as buttons listed in order of customer waiting time. A central cashiering dialog appears on top of the order Pickup view. Once a customer is selected, this dialog disappears for the duration of the Pickup transaction and reappears when the Pickup is complete. Central cashiering is a configuration option.

SCANNED ORDER PICKUP MODE

This configuration option requires order barcodes to be scanned prior to sale to prevent incorrect pickups. Only scanned orders appear with a *Pick Up*, manual selection is not possible.

AUTOMATIC PICK LIST PRINTING

As an option to using the manual **Pick List [F11]** button, an order pick list will automatically print if there are X number of orders or more marked for pick up. The variable X is typically set to "2" (default). The suggested printer for this process is a thermal printer. A typical pick list is shown below.

*** Pick List ***

Westgate Cleaners
555-1234

Brown, Trish
(801) 555-2300

Invoice	Pcs	Loc	Dept. Group	Due
08-000093	1	00	Wedding	$120.00
08-000103	2	0123	DryCleaning	$9.68
08-000106	5	0225	DryCleaning	$18.00
08-000105	3	0265	Laundry	$4.56
08-000094	2	0789	DryCleaning	$14.50
08-000104	2	0885	DryCleaning	$9.67
08-000102	2	456	DryCleaning	$12.00

7 Orders 17 Pieces Total Due: $188.41

CLK DC9 09/11/02 10:31 AM

Sample Pick List

DISPLAY POLES

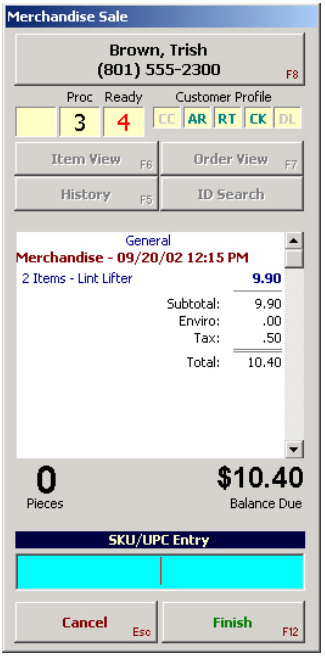
An optional display pole is available to help reduce theft loss directly from the customer. It shows all payment transaction totals along with the selected customer (see *Hardware and Accessories* chapter).

Order Quoting

This function is accessed by selecting the **HP Quote [5]** button and provides a priced quotation to a customer. Order quoting uses the Detail process described earlier, with two exceptions:

- Customer Lookup occurs at the end of the process.
- The quotation can be later converted to an order.

After garments are detailed, the system asks to either print a quote receipt or turn the quote into an order, thereby displaying the **CL** view for customer selection and completion of the order as a normal Detail order would occur.

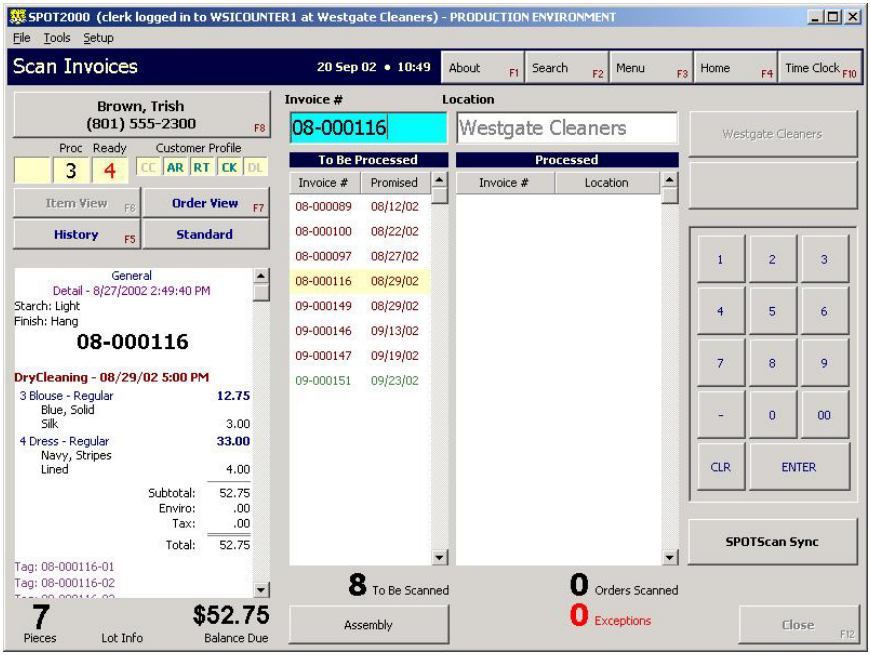


Merchandise Sale Dialog

Merchandise Sales

This function is accessed by selecting the **HP Merchandise [6]** button or the **Merchandise** button on the order Pickup view. This is a standard retail POS function that is used to sell individual items directly and is independent of processing an order. As such, merchandise sales are defined for use with items that have UPC barcodes or SKU numbers such as soda cans, candy bars, etc. This function differs from order processing in that a sale order is opened and closed as a single transaction. Processed orders, on the other hand, are opened when dropped off and closed at picked up.

This dialog is essentially a replica of the standard order **VI** with provisions for a UPC/SKU entry field. Sales items and associated amounts must be entered into SPOT prior to using this function. From this view, simply scan a sales item(s) and press the **Finish [F12]** button to open the cash drawer, print a receipt, and close the order. Note that inventory levels of unsold products are not currently supported.



Order Process Steps View

Order Process Steps

This function is accessed by selecting the **HP Order Process [7]** button. Any number of user-definable workflow process steps can be added between the standard Quick and Pickup steps. Definable order process steps also contain status indicators; however, they are user-definable to conform to the desired purpose of the step.

For example, in multiple store operations a process step might be added after Quick (which might happen at a drop store) to log orders bound for the plant onto a delivery truck. This step could be called *Truck* or *Van* indicating that the order is currently in transit. Workflow steps can be as simple as a scan station marking orders passing a particular point or as sophisticated as a predefined functional step. SPOT contains several predefined steps to choose from:

- Central Cashiering
- Central Detailing (Mark-in)
- Assisted Order Assembly
- Route Truck Order Verification

The order Process Steps view is a replica of the *Rack* view and functions in the same manner with two exceptions:

- Upon selection of the **HP Process Steps** button, a dialog view is presented allowing step selection. The currently selected process step is noted on a new button located directly below the *To Be Processed* field. Pressing this step button allows direct selection of any other defined process step as a short cut when using the same workstation for multiple process steps.
- The *Location* column in the *Processed* window displays the defined step status indicator rather than the rack location (as does the Rack function).

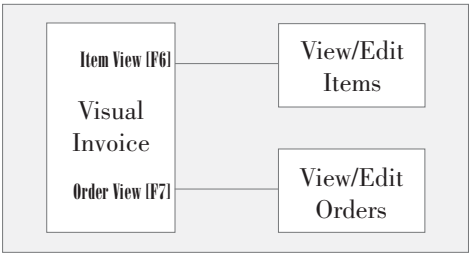
When a path for steps is configured (as shown in **HP Process View** tab), an order must take that path. Orders will not appear in the *To Be Processed* field unless they have passed the previous step. Scanning an order out of sequence results in a warning dialog display indicating the problem.

Order Exception Handling

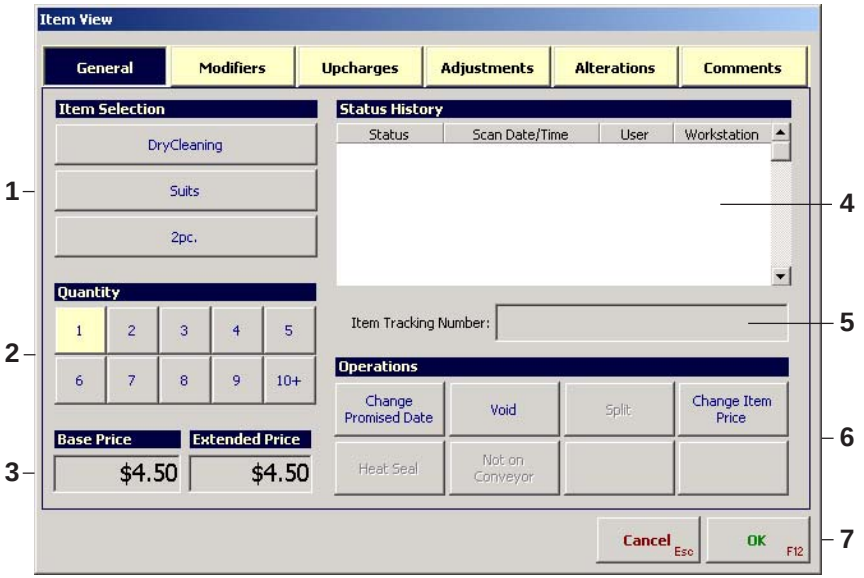
Item View

Order View

*The two Visual Invoice (**VI**) buttons, **Item View [F6]** and **Order View [F7]**, provide a convenient way to view and/or modify the contents of an order item (garment) or an entire order. These two buttons are common to the **VI**, the most logical point for access. In addition, each view contains a group of Task buttons which provide quick access to specialty functions such an void, redo, print, change promised date, etc. By consolidating all exception handling needs and logical tasks into these two views, users always know where to go to handle any exception, greatly minimizing learning time. Selection tabs in each view provide access to all available functions. The General tab in each view always contains the most commonly used information and is therefore the default view.*



Order Exception Handling from Item & Order View Functions



*Item View—**General Tab***

Item View

From this view, all Item-level changes can be made. For example, to change the piece count of an Item, the General tab offers single-button quantity selection. The **Item View [F6]** button on the **VI** is inactive (grayed-out) until an Item is selected on the displayed invoice. Once an Item has been selected, this button becomes active allowing access to the *General* tab. Additional selection tabs provide access to other available Item-level functions as described below.

GENERAL TAB

1 Item Selection

These buttons are used to reselect the item type. Each button displays the previously selected Department, Category, and Item names. Selecting the Department button, for example, displays a dialog containing all the Department selection buttons.

- **Top Button**—Department display/reselection.
- **Middle Button**—Category display/reselection.
- **Bottom Button**—Item display/reselection.

2 Quantity

Buttons "1 - 9" allow Item quantity reselection. The **10+** button displays a numeric pad for entry of quantities greater than nine. The current piece count button for the selected Item is displayed in yellow.

3 Base/Extended Price

These two fields display the unit amount of the selected Item and the extended price (unit price multiplied by quantity). If the quantity selected is "2", then the extended price would be twice the base price.

4 Status History

This area displays a history of the selected Item by displaying a list of completed processing steps. This field is active only if using SPOT Item tracking functionality.

5 Item Tracking Number

If Item tracking functionality is active (the *ScanTrac* feature), the Item HSL number is displayed here. This number can be an HSL or paper tag barcode.

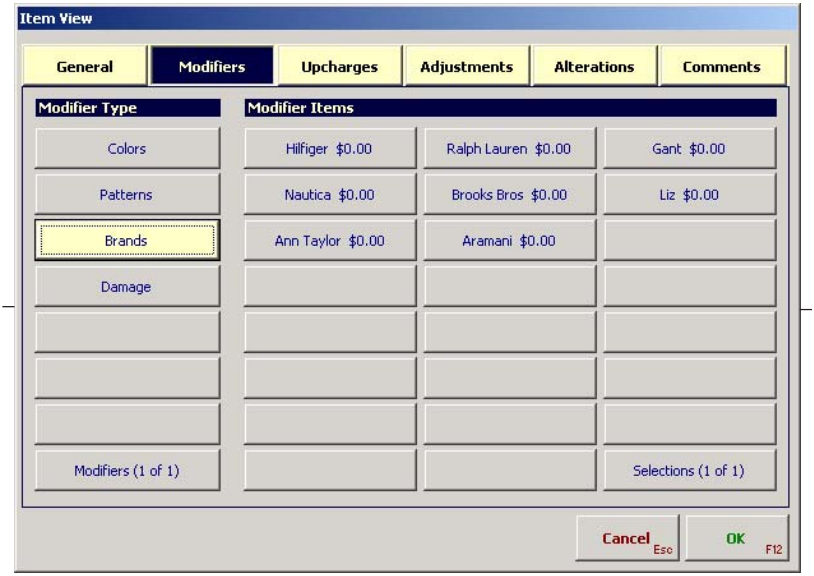
6 Operations Buttons

These buttons allow quick access to commonly needed Item functions. Buttons grayed-out are not active for the selected Item. Changes to an Item made from a task button initiates a prompt to reprint the affected invoice. These functions can be made to require **PIN** access.

- **Change Promised Date**—Activates the promised date calendar for a promised date reselection.
- **Void**—Allows the selected Item to be voided from the invoice. A *Void* watermark is placed on the affected item.
- **Split**—Allows Item(s) to be split from the selected invoice, creating a new order automatically. A *Split* watermark is placed on the affected Item showing the new invoice number for the split order.
- **Change Item Price**—Provides a manual price override for the automatically set price.
- **Heat Seal**—Allows an HSL label to print for the selected Item.

7 Process Buttons

- **Cancel [Esc]**—Exit without saving changes.
- **OK [F12]**—Exit and save any changes made to the selected Item.



*Item View—**Modifiers Tab***

MODIFIERS TAB

Upon initial entry into this tab, the Colors Modifier view is selected, displaying previously applied colors as yellow buttons. Other Descriptor buttons behave in the same manner. Multiple colors can be selected. All other Modifiers are allowed a single selection only.

1 Modifier Type Buttons

Each button allows the selection of a user-defined Modifier group. Pressing **Brands** buttons displays available predefined Brand choices in the *Modifier Items* button list. Press the **Descriptors (1 of X)** button for additional Modifier groups (other groups exist if X is greater than 1).

2 Modifier Items Buttons

Each button represents a collection of unique predefined Modifiers associated with the selected *Modifier Type*. Buttons appearing in yellow are the current Item Modifier value. To change the current value, select a different Modifier. Press the **Selections (1 of X)** button for additional Modifiers (other groups exist if X is greater than 1).

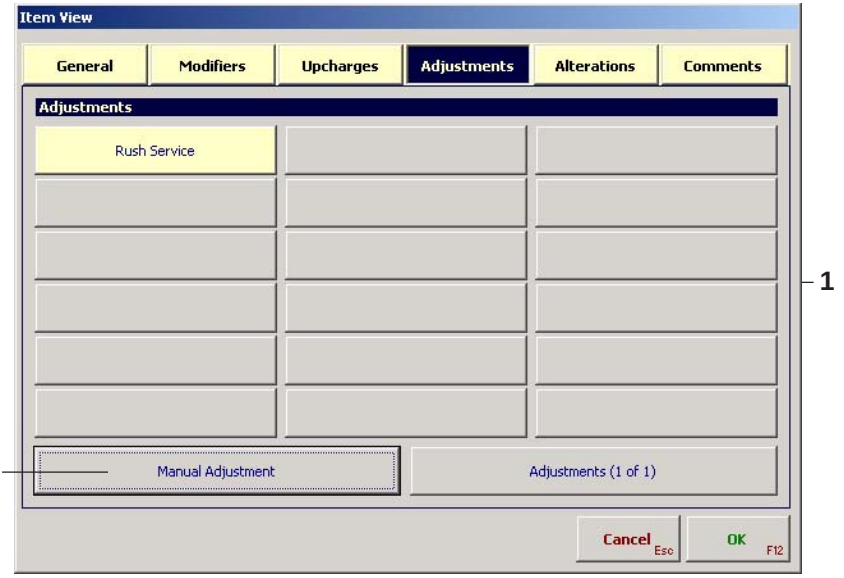
*Item View—**Upcharges Tab***

UPCHARGES TAB

Allows changes to be made to Item Upcharges. Upon initial entry to this tab view, Upcharges previously applied to the selected Item are displayed with a yellow button. Note that multiple Upcharges can be selected.

1 Upcharges Buttons

Each button represents a unique predefined Upcharge. To change the current value, simply press a different Upcharge button. Press the **Upcharges (1 of X)** button for additional Upcharges (other groups of buttons exist if X is greater than 1).



*Item View—**Adjustments Tab***

ADJUSTMENTS TAB

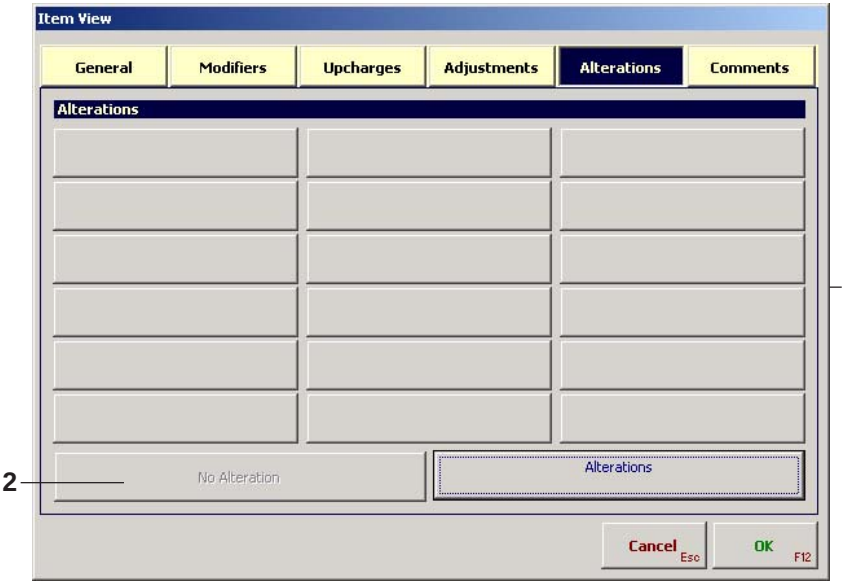
Allows changes to be made to Item Adjustments. Upon initial entry to this tab view, Adjustments previously applied to the selected Item are displayed with a yellow button.

1 Adjustments Buttons

Each button represents a unique predefined Adjustment. Buttons appearing in yellow are the current Adjustment values of the selected Item. To change the current value, simply press a different adjustment button. Press the **Adjustments (1 of X)** button for additional adjustments (other groups of buttons exist if X is greater than 1).

2 Manual Adjustment Button

Displays a dialog button used to manually enter an Adjustment description and amount.



*Item View—**Alterations Tab***

ALTERATIONS TAB

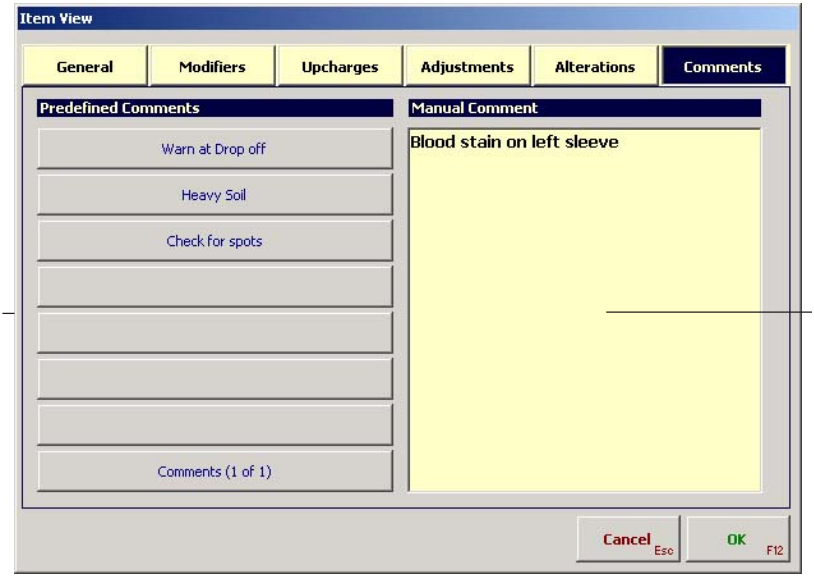
Pressing the **Item Alteration** button during Detail accesses this function for Alteration additions. Alterations previously applied to the selected Item are displayed with a yellow button. Alteration choices are configurable with *Price Later* and *Price and Describe* functions fully supported.

1 Alterations Buttons

Each button represents a unique predefined Alteration. To change the current value, simply press a different Alteration button. Press the **Alterations (1 of X)** button for additional alterations (other groups of buttons exist if X is greater than 1).

2 Alter and Clean Button

This button is a dual function button switching between **Alter and Clean** and **Alter Only** when pressed. The first designation adds both cleaning charge and selected Alteration charge line Items to the invoice with a single demand tag printed. Alter Only specifies the selected Alteration as the only line Item on the invoice, no cleaning is performed.



*Item View—**Comments Tab***

COMMENTS TAB

Allows changes to be made to Item Comments. Upon initial entry to this tab view, Comments previously applied to the selected Item are displayed with a yellow button or with text shown in the manual field.

1 Predefined Comments Buttons

Each button represents a unique predefined Comment. The button appearing in yellow is the current Comment for the selected Item. To change the current Comment, simply press a different comment button. Press the **Comments (1 of X)** button for additional Comments (other groups of buttons exist if X is greater than 1).

2 Manual Comment

A Comment can be manually typed into this field.

*Order View—**General Tab***

Order View

From this view, all order-level changes can be made. For example, to redo an entire order, the General tab offers a single-button access. The **Order View [F7]** button on the **VI** is always active when a valid invoice is displayed. Additional selection tabs provide access to other available order-level functions as described below.

GENERAL TAB

1 Visual Invoice

A copy of the **VI** is displayed for reference since order-level changes tend to require an order content preview. Note that the **Order View** button has been removed since it serves no purpose. Also note that the **Item View [F6]** button is not active unless an Item is selected.

2 Summary

This is an order summary area showing the current order number, status, and processing statistics.

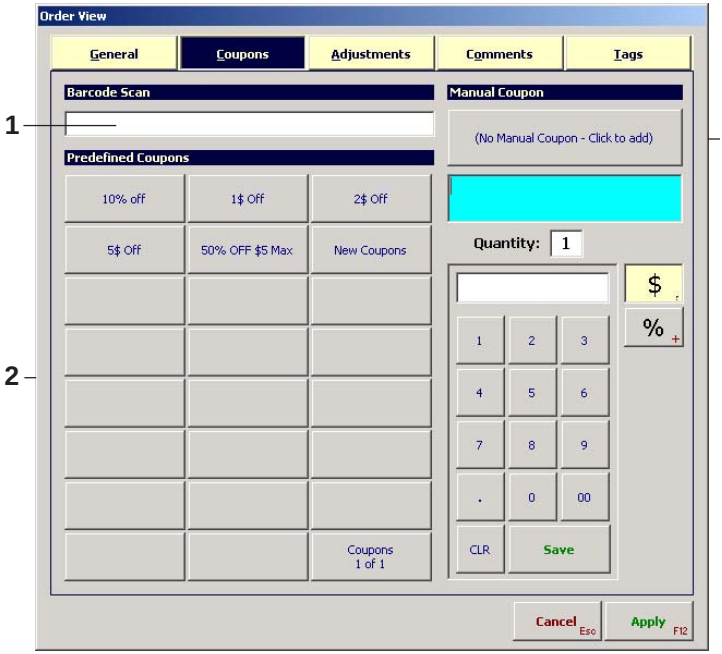
3 Operations Buttons

These buttons allow quick access to commonly needed order functions. Buttons grayed-out are not active for the selected order. Changes to orders made from task buttons force a prompt to reprint the affected invoice. These functions can be made to require **PIN** access.

- **Reprint Invoice**—Reprints the selected invoice with the word "REPRINT" appearing on the invoice for security purposes.
- **Reprint Tags**—Reprints a set of previously assigned demand tags. Note that this function is only active for demand tag printing.
- **Void**—Forces the selected order to be voided, effectively closing the order with a *Void* status. Order amounts are removed from sales totals. A *Void* watermark appears on the order in the **VI** only.
- **Redo**—This specialized split function forces the selected order to be reprocessed, generating a new redo invoice automatically with an indication of the originating invoice number. There are two pricing configuration options for a redo. The first in which the order was previously paid and returned for additional cleaning—the redo order will show a zero amount. The second where the order was not paid (problem noticed at the counter prior to payment)—the redo order will show the original amount due. The system handles both conditions automatically. A *Redo* watermark is placed on the order number in the **VI** only. A redo of a redo is not allowed.
- **Make Payment**—Allows a cash amount to be applied against the selected order if there is an outstanding balance due.
- **Print Receipt**—Prints a formatted receipt for the selected order.
- **Reassign Customer**—Allows the selected order (if incorrectly created) to be reassigned to the proper customer.
- **Locker Pickup**—Flags the selected order for a 24 hour locker pickup with indication on the **VI** and printed invoice.
- **Split**—This function allows one or more Items to be split from the selected invoice, creating a new invoice with an indication of the originating invoice number. A *Split* watermark is placed on the order number in the **VI** only.
- **Visit History**—Shows all associated orders in the Search view.
- **View Video Capture**—Future function.
- **Reprint Visit**—Reprints visit ticket.
- **Change Promised Date**—Activates the promised date calendar dialog allowing for a simple visual promised date change of the selected order.

4 Process Buttons

- **Cancel [Esc]**—Exit without saving changes.
- **OK [F12]**—Exit and save any changes made to the selected item.



*Order View—**Coupons Tab***

COUPONS TAB

Allows order-level changes to be made to Coupons. Upon initial entry into this tab view, Coupons previously applied to the selected order are displayed with a yellow button.

1 Barcode Scan

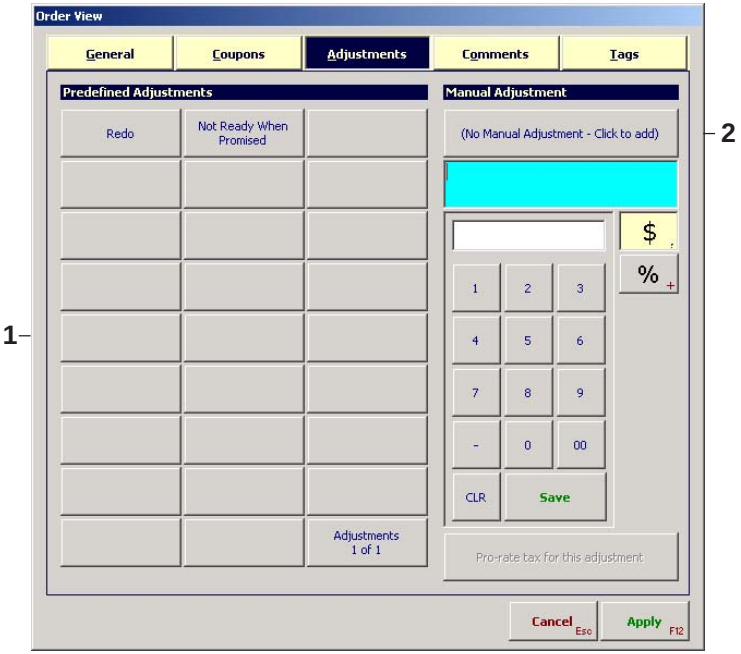
The entry field for scanned Coupon barcodes. Predefined Coupon barcode numbers automatically select a Coupon type.

2 Predefined Coupons Buttons

Each button represents a unique predefined Coupon. The button appearing in yellow is the current Coupon for the selected order. To change the current Coupon, simply press a different button. Press the **Coupons (1 of X)** button for additional Coupons (other groups of buttons exist if X is greater than 1).

3 Manual Coupon Button

Allows manual Coupon by amount/percentage to be entered.



Order View—***Adjustments Tab***

ADJUSTMENTS TAB

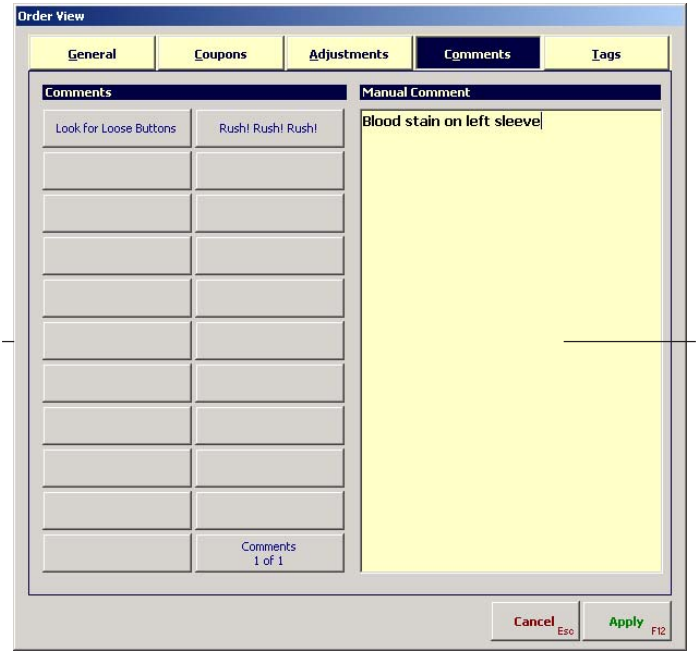
Allows order-level changes to be made to Adjustments. Upon initial entry into this tab view, Adjustments previously applied to the selected order are displayed with a yellow button.

1 Predefined Adjustments Buttons

Each button represents a unique predefined Adjustment. The button appearing in yellow is the current Adjustment value for the selected order. To change the current value, simply press a different Adjustment button. Press the **Adjustments (1 of X)** button for additional Adjustments (other groups of buttons exist if X is greater than 1).

2 Manual Adjustment Button

Activates the manual Adjustment description and amount fields. Both flat amount and percentage are supported. The **Prorate Tax for this Adjustment** button allows applicable sales tax for the Adjustment to be calculated.



Order View—***Comments Tab***

COMMENTS TAB

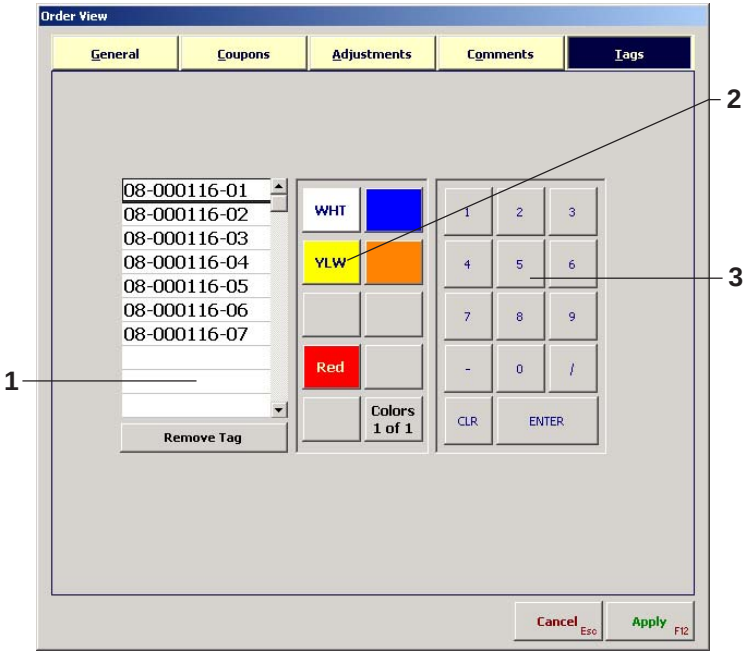
Allows order-level changes to be made to Comments. Upon initial entry into this tab view, Comments previously applied to the selected order are displayed with a yellow button or in the manual text field.

1 Predefined Comments Buttons

Each button represents a unique predefined Comment. The button appearing in yellow is the current Comment for the selected order. To change the current comment, simply press a different Comment button. Press the **Comments (1 of X)** button for additional Comments (other groups of buttons exist if X is greater than 1).

2 Manual Comment

A Comment can be manually typed into this field.



*Order View—**Tags Tab***

TAGS TAB

Allows preprinted Tag assignments to be made to an order. Entry format typically includes a color, number, and separation characters. Note that this tagging function is for manual entry of preprinted Tags only. There is no need for this view when Tags are printed on demand.

1 Tag List

Previously assigned Tags are listed in this field. Multiple preprinted Tags can be assigned to a single order. Select a Tag and press the **Remove** button to delete an existing Tag.

2 Tag Color Buttons

Used to assign a color to a Tag entry.

3 Numeric Pad

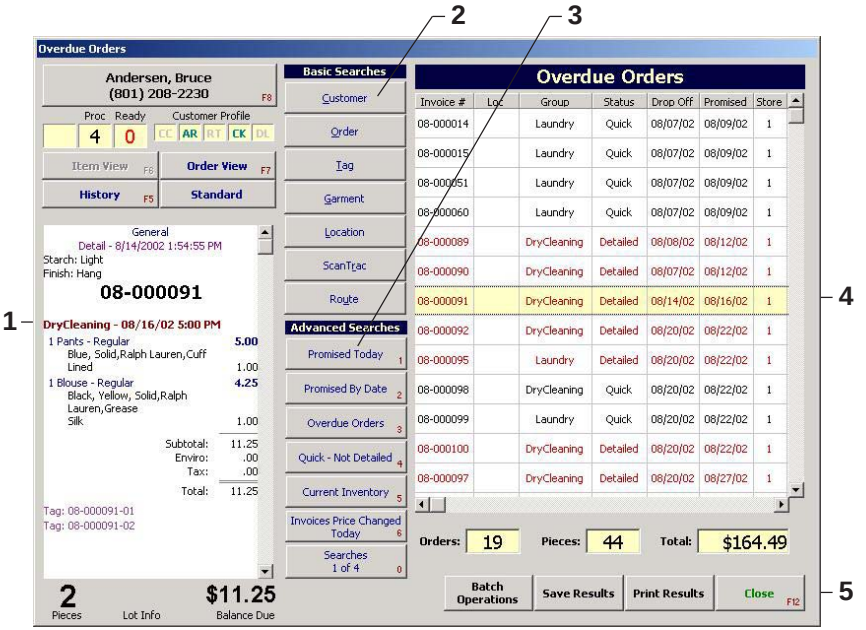
Used to assign a number and special characters, "-" and "/", to format the resulting Tag number. A Tag will be listed as "Red/1234" since a "/" will be automatically added after a color selection button is pressed. Press **Enter** to add additional Tags. Press **Apply [F12]** to add the entered Tag numbers and print the invoice.

Order Search Utility

Order Search View

Automatic Access

Search is accessible via the **HP** Search [F2] *function button. This advanced function allows rapid access to lists of orders. For example, a list of orders by customer, invoice number, tag number, garment type, and heat seal labels can quickly be displayed at the touch of a button. This unique utility lists orders based on various criteria, usually selected from a single button. Designed for quick access, it effectively replaces the need to run cumbersome work-in-process reports. The order list and title line display selection results. The number of orders, pieces, and associated value are also displayed. A list of orders can be saved to a file for printing as a normal report. Other functions automatically activate the Search view populated with the list of affected orders.*



Order Search View

Order Search View

1 Visual Invoice

Included in the Search view, the **VI** provides access to vital order information and history. It also allows access to the **CV** as well as item and order editing. The contents of a highlighted order in the list is displayed in the **VI**.

2 Basic Searches

Basic searches normally require some form of additional input. For example, searching for orders by customer requires the **CL** view in order to display the results. Each search results in a list of orders filtered by the selected *Basic* search type.

- **Customer**—Displays a list of all orders for the selected customer.
- **Invoice Number**—Displays the selected order only.
- **Tag**—Displays the order associated with a preprinted tag number.
- **Garment**—Displays a list of orders based on garment description.
- **Location**—Displays orders racked at selected conveyor locations.
- **Route**—Displays all orders in process for the selected route.

3 Advanced Searches

Advanced search functions mimic several of the *Alert* buttons. In fact, these buttons are designed to replace work-in-process reporting altogether, allowing the user to have instantaneous access to in-process order activity. In most cases, work-in-process information is viewed and optionally printed, making this approach faster and more efficient than accessing a standard report. Advanced searches are script-based allowing for the addition of new advanced search buttons with upcoming SPOT version releases. Press the **Searches (1 of X)** button for more searches (other groups of buttons exist only if X is greater than 1).

- **Promised Today [1]**—Displays a list of current promised orders.
- **Promised By Date [2]**—Displays orders promised by date range.
- **Quick Not Detailed [3]**—Displays orders with a Quick status.
- **Overdue Orders [4]**—Displays orders not ready as promised.
- **Current Inventory [5]**—Displays orders with a *Ready* status.
- **Invoices Price Changed Today [6]**—Displays orders with changes in price.

4 Orders List

Shows the necessary detail to help identify problem orders. Selecting an order in the list displays the contents of that order in the **VI**. Initially, displayed orders are sorted first by promised date then by order number. Button column headers can be double-clicked to force the sort order based on that column type. Contents of the list are color coded by order status for easy identification.

- **Quick**—Black
- **Detail**—Red
- **Ready (Rack)**—Green
- **Sold (Pickup)**—Blue

The caption bar at the top of this list shows the type of search conducted. Vertical and horizontal slider bars in this view allow access to all important data. Totals at the bottom of the screen display orders, pieces, and the value of listed orders.

5 Process Buttons

- **Batch Operations**—Allows the selected operation, such as Void or change Promised Date, to apply to all orders displayed in the Order List. The dialog presented when pressing this button displays a checkmark list allowing modification by order. This function is protected by **PIN** security.
- **Save Results**—Saves the contents of the Order list to a Microsoft Excel compatible spreadsheet file.
- **Print Results**—Prints the contents of the Order list to the report printer. The printed report differs in format from the Order list.
- **Close [F12]**—Exit the Search function back to the previous view. If invoked from the order Pickup view, exit from this view re-displays the Pickup view, for example.

Automatic Access

The Search view is accessed from various areas in SPOT. When an automatic function activates the Search view, all applicable orders are preselected by the initiating function and passed to the Search view. Using the same Search view in this way, reduces learning time.

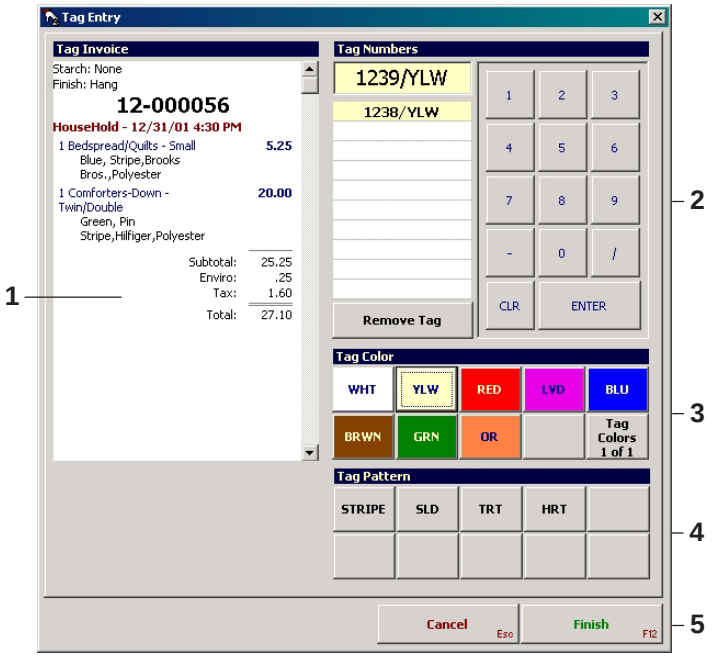
- **CV A/R**—In the Payment History tab, double-clicking on a Payment displays the Search view populated with all paid orders.
- **Route Tab**—In the Route Stop view, pressing the View Orders button displays the Search view populated with all orders for the selected route.
- **HP Alerts**—Pressing an alert button displays the Search view populated with all orders related to that alert.
- **HP Transactions**—Selecting an order and pressing the Visit History button displays the Search view populated with all orders associated with the initial customer dropoff visit.
- **HP Process**—Double-clicking on any graphic process step displays the Search view populated with all orders currently at that step.
- **HP Production Commitment**— Selecting a cell displays the Search view populated with all orders relating to that cell.

Tags & Lot Management

Preprinted Tagging
Demand Tagging
Lot Control
Lot Manager

SPOT can be configured to manage garment tagging and lot tracking. In the preprinted tagging mode, the user is prompted for the preprinted tag number and color at the end of the Detail process. Alternatively, the system can print tags on demand automatically, thereby eliminating the higher cost of purchasing large quantities of preprinted tags. Demand printed tags contain a greater amount of system supplied information—such as customer name, order number, piece range count, date due, and lot tracking numbers—making manual reassembly faster and more efficient. Tagging modes are defined by department, allowing demand tags to be printed for drycleaning garments while prompting for preprinted tag numbers for shirt laundry if desired. If activated, lot management works hand-in-hand with demand tag printing to create a highly efficient garment management solution.

Preprinted Tag Entry Occurs after Detailing



Detail Receive Preprinted Tag Entry Dialog

Preprinted Tagging

This dialog is similar to that of the Tag tab in the Order View function. If configuration is set to use preprinted garment tags, this dialog appears immediately after Detail completion and just prior to printing the newly detailed order. If demand printed tagging is active, this dialog does not appear. Entry format contains a color, number, and separation characters. The resulting preprinted tag information is assigned to the order in process and is viewable from various areas of the system:

- Listed on the **VI**.
- Printed on the printed invoice (definable).
- Edited in the Order View function Tags tab.
- Used by Search [F3] to find an invoice by tag number.

1 Tag Invoice

A reduced version of the **VI**, content of the detailed order is displayed here to aid the tag assignment process.

2 Tag Numbers

This area provides both display and entry of preprinted tag numbers. Multiple preprinted tags can be assigned to a single order. Use special characters, "-" and "/", to format the resulting tag number for better readability. Press **Enter** to add an additional tag and **Remove** to delete an existing selected tag.

3 Tag Color

Enters the color of the preprinted tag.

4 Tag Pattern

Enters the pattern of the preprinted tag. Pattern selection is used to expand the total number of available tags beyond the standard 10 tag colors.

5 Process Buttons

- **Cancel [Esc]**—Exit without saving changes.
- **OK [F12]**—Exit and save any changes made to the selected Item.

ASSISTED TAG ENTRY

Configuration control allows a tag *Mask* to be defined. This mask can contain tag color, pattern, and numeric sequence information. During the detail process, the mask information is used to automatically populate the *Tag Numbers* list for each Item in the invoice. For example, if the tag mask was created to be "Red/Stripe/001" and the next invoice contained five Items, the preprinted tag number list would contain five entries in the form:

Red/Stripe/001
Red/Stripe/002
Red/Stripe/003
Red/Stripe/004
Red/Stripe/005

If the user changes the tag color or pattern by selecting a different color or pattern, the tag number list changes to reflect the new values. The values are then memorized until subsequently changed. This feature saves a great deal of time when using preprinted tags.

Demand Tagging

Once configured, this function is automatic requiring no user intervention other than periodically changing the tag printer paper color.

AUTOMATIC NUMBERING

The demand tagging function needs no additional tag number like the preprinted tagging function. Instead, demand tags are assigned automatically by the system using the invoice number to which they are associated. The piece count on the **VI** determines the number of tags to print, one for each piece. Under configuration, an additional master tag can be forced to print with each order for attachment to the invoice.

PRINTED FORMAT

Demand printed tags have an associated document editor which allows the tag format to contain almost any type of information within the space limits of the tag size. Since there is a large amount of information that could be printed on a demand tag, the document editor allows the user to customize the printed tag to meet the exact needs of the drycleaner. Tag information typically available includes:

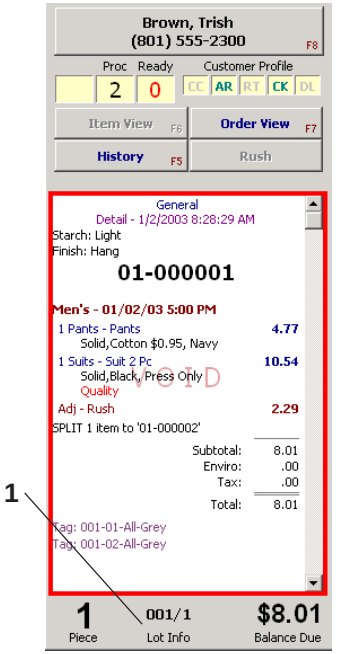
- Tag number (invoice number)
- Customer name
- Piece X of total Y count
- Item description
- Promised date
- Lot # / pieces in lot

TAG STYLE

Demand tag printing uses blank wet strength perma-fiber tag stock available in the 10 industry standard colors. Tags are typically printed with a dot matrix type printer using an indelible ink printer ribbon to eliminate ink bleed on garments during the cleaning process. Blank tag stock comes in various types:

- Perforated continuous buttonhole size for shirt laundry garments.
- Perforated continuous for drycleaning garments.
- Roll paper uses a special printer with an internal paper cutter.

The advantage of the roll paper printer is that it can print almost any size tag height under program control; however, this tag is only 3 inches wide.



Visual Invoice

Lot Control

Working hand-in-hand with demand tag printing, built-in lot management utilities provide a way to streamline high-volume drycleaning operations.

1 Lot Control Information

During the Detail process, lot control information (when activated) displays the current lot number and lot group for the selected order. This information is also available on the bottom center of the **VI** in addition to the following places:

- The printed invoice.
- Demand printed tags.

LOT PROFILES

The lot management system in SPOT is extremely flexible. Tracking lots can be set by either piece or order. Under configuration control, lot sequencing can be customized to fit almost any need. Multiple unique lot control profiles can be assigned uniquely by the following:

- Department
- Color
- Day
- Piece

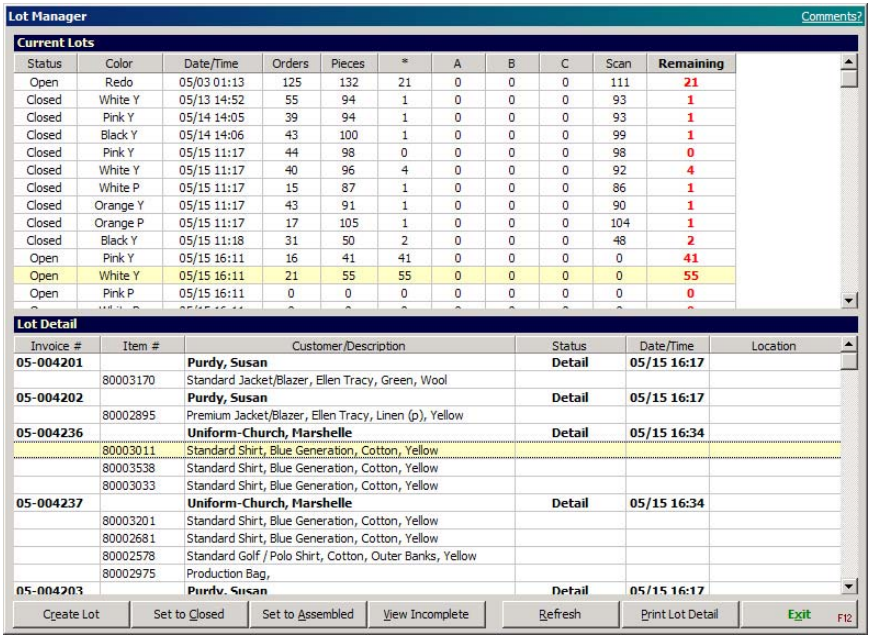
Lot sequencing can be configured using a variety of rules:

- Minimum lot number
- Maximum lot number
- Max number of pieces in a lot
- Cycle lot on change of day
- Do not cycle lot on change of day

Once the lot sequencing has been defined and configured, lot sequence proceeds based on established rules, automatically printing lot control number on demand tags.

MULTIPLE TAG PRINTERS

Under normal circumstances, tag printing is accomplished with a single tag printer. The user is prompted automatically to change paper color (when lot tracking is set for colors). SPOT can also be configured to accommodate several simultaneous tag printers, eliminating the necessity to change paper colors. In this mode each printer is loaded with a unique color. When a lot color changes, the system automatically selects the next printer with the appropriate paper tag color.



Lot Manager View

Lot Manager

The Lot Manager is accessed via **Menu [F3]** and provides real-time lot activity tracking of garments traveling through automated conveyor assembly systems, SPOT's internal *Assisted Assembly* function, or a manual assembly process. Item-level tracking by barcoded garment tags, *ScanTrac (HSL)*, or *RFID* tag allows for pinpoint accuracy using the Lot Manager. Lots can be created or closed from this view. Incomplete lots can be displayed at the touch of a button. Normally, this view is displayed on the production floor bagging workstation which provides real-time monitoring of Item flow and the assembly process. The view is continually updated to provide immediate visual access of production flow. Several buttons help manage lot flow:

- **Create Lot button**—Creates a new lot.
- **Set to Closed button**—Closes an existing lot.
- **Set to Assembled button**—Closes a lot, removing it from display.
- **View Incomplete button**—Shows items (pieces) not complete.
- **Refresh**—Immediately updates the display with the latest lot data.
- **Print Lot Detail**—Prints summary of all displayed lot data.
- **Exit [F12]**—Terminates the Lot Manager function, returns to **HP**.

CURRENT LOTS DISPLAY

Each lot is displayed on a separate line. The *Status* of each lot, whether *Open* or *Closed*, is shown along with the lot identifier (in this example, color), *Date/Time* opened or closed, total *Orders* and *Pieces*, items passing the final assembly scan point, and those Items pending final assembly. Any number of lots are shown in process at a given time allowing extremely high-volume assembly plants to operate more efficiently. Also, the *Remaining* column indicates potential problem lots.

LOT DETAIL DISPLAY

Highlighting any lot in the *Current Lots* display exposes the detail of that lot in the *Lot Detail* display. *Invoice* numbers, *Item* numbers, *Customer* and *Description*, current order *Status*, *Date/Time* of order status, and final order rack *Location* are all listed for instant order identification and problem recognition.

Incentives and Taxes

Coupons

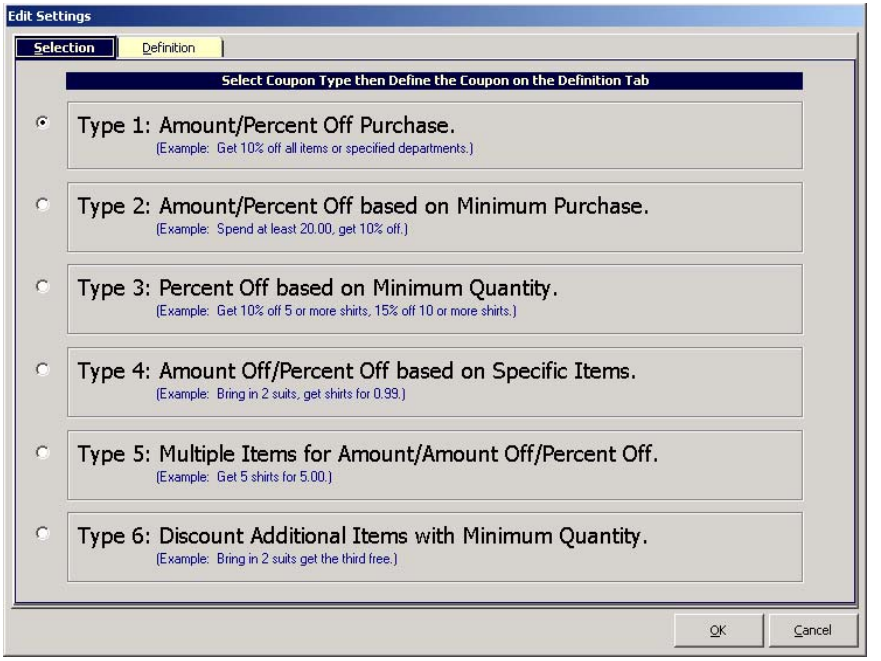
Rewards

Discounts

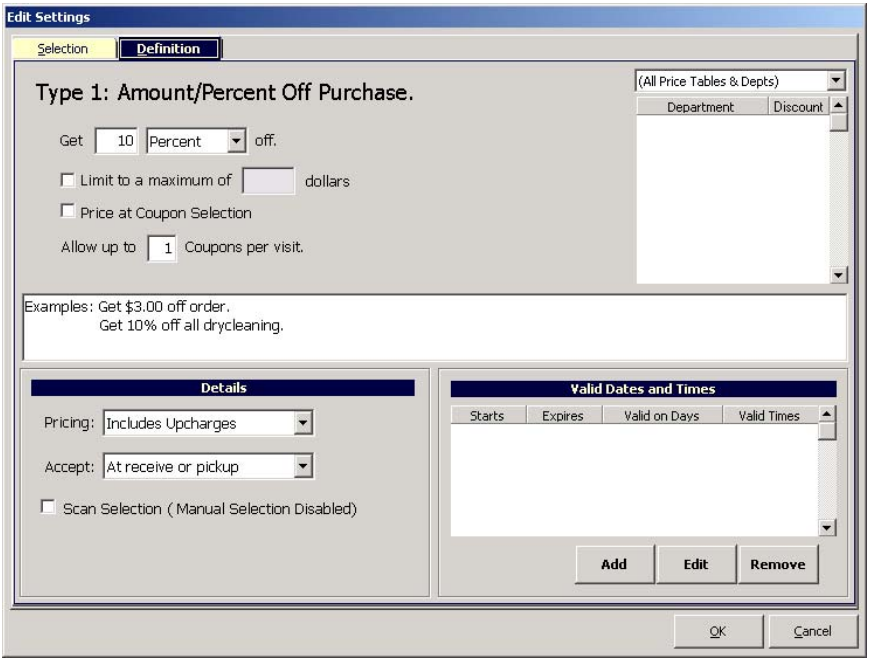
Surcharge Tax

Sales Tax

SPOT offers a variety of ways to provide customer incentives and order charges. Some of these options are pre-configured prior to use and applied automatically, while others are applied manually during the order production process (see Order Exception Handling section). This section discusses the definition and use of each type of incentive and charge.



*Coupon Configuration—**Selection Tab***



*Coupon Configuration—**Definition Tab***

Coupons

Coupons are by definition negative (debit) adjustments to an order and, once configured, are available for application during the dropoff or pickup. Six coupon types are available to select from, each with its own unique characteristics. An almost limitless combination of specials can be created and activated by date range, day, hour, department, etc.

During coupon configuration, once a type is selected from the *Selection* tab, the actual coupon is then defined from the *Definition* tab by filling in easy to understand fields and checkboxes. The result is saved as an active coupon ready for automatic or barcoded application to an order. A coupon can be added to an order only at a defined process step and can include/exclude upcharges. SPOT keeps track of all the details including a list of all coupons awarded to the customer as displayed in the **CV Promotions** tab.

COUPONS AS AN EVENT

Coupons are single events that occur once the configured criteria is met. Coupons may be barcoded and must be presented by the customer for redemption. For example, you could setup a coupon award for 2 shirts free with every 5 pair of pants on each visit. If these conditions are met and the customer provides the associated coupon, the award is granted in the form of a coupon adjustment to the invoice.

COUPONS OVER TIME

A promotion works across time and customer visits (configurable), triggering a defined coupon award automatically when conditions are met. No clerk intervention is required. The award is issued on the last qualifying invoice.

In the coupon case described above, you could extend the flexibility and marketing effectiveness of this coupon by introducing a promotion. For example, the same coupon could be set for 5 shirts free with every 15 pair of pants and made to accumulate over a period of several days, weeks, or months. It could be made to reset and start over again automatically once the coupon criteria is met and the coupon issued, or simply continue until the end of the promotion period then stop. By letting promotions trigger coupons, you can create valuable loyalty programs over long periods of time.

Promotions must be predefined in configuration and assigned to each customer via the **CV Details** tab.

EMPLOYEE INCENTIVES

The coupon feature is much more useful than the standard discount function in its ability to automatically handle more complex employee drycleaning rewards. For example, you could give employees $25 worth of free drycleaning and discount every order thereafter 50% for each month as a way of controlling abuse of freebees.

Rewards

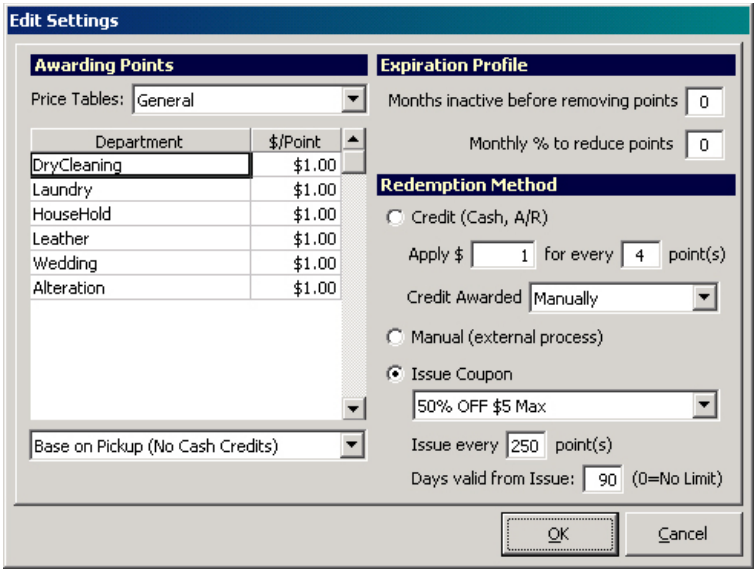
The rewards program adds an additional customer incentive option to your arsenal of SPOT marketing tools. Under this program, customers receive a reward in the form of a redeemable coupon when a preset number of points have been accumulated. Departments are defined to factor the number of dollars spent per accumulated point, the most common being $1.00 per point. Skewing a reward for less profitable departments is as easy as changing the number of dollars required to award a single point (i.e., $2.50 per point).

Once the defined number of total points is achieved, the resulting reward is the issuance of a predefined coupon. The barcoded coupon is printed at the time of order pickup for redemption on a subsequent visit.

REWARD RULES

Rewards profile configuration is found under *Program Configuration* > *Company Settings* > *Customer Rewards Settings* > *Customer Rewards Profile*. The following rules apply to the rewards program:

- Rewards can play a .WAV file each time a reward is issued (i.e., the Windows *tah dah* sound) provided the counter workstation is equipped with multimedia card and speakers.
- Redemption is tracked by scanning the redeemed reward barcode from the *Order Coupon* button during the *Detail* process. Barcodes are printed on each printed reward guaranteeing redemption for a single reward only.
- Multiple rewards can be defined and assigned by customer or VIP in the **CV Details** tab.
- Rewards have an expiration date beyond which the coupon can't be redeemed.
- Cash credit reward points can be set to expire at once or over time.
- Rewards point accrual can restart automatically after a reward is issued to create an ongoing program.
- Reward coupons are printed to a thermal invoice printer.
- The **CV Promotions** tab displays all rewards received for the selected customer.



*Rewards Configuration—**Award Profile Dialog***

Printed Rewards Coupon

ACTIVATING REWARDS

There are two ways to activate a customer reward. Both require the creation of a reward profile. Once a profile is created, the reward program continues accumulating points and printing rewards coupons automatically until deactivated.

- **Automatic**—Setting a default profile automatically activates the profile for every new customer added from that point forward. Note that existing customers (added prior to default profile activation) will not be retroactively activated. Existing customers must be activated manually. The default profile is selected from *Store Settings* > *Customer Rewards* > *Settings* > *Default Rewards Profile*.
- **On Demand**—If an automatic default profile is not set, a rewards program can be activated manually in the **CV Details** tab by selecting an entry from the *Rewards Program* field.

Discounts

By definition, a discount is a negative adjustment (debit) to an order. Discounts can be configured as either a percentage (1% to 100%) or flat amount. Discounts can be configured then assigned to specific customers. For added flexibility, discount percentages can be independently defined by department. For example, an employee discount could be created giving a 20% reduction on drycleaning orders and 10% on laundry orders.

Assignments to customers are made in the **CV General** tab. They remain assigned until changed. During the Detail process, an assigned discount will automatically apply and appear on the resulting invoice showing the discount description. As an example, discounts could be setup for the following:

- Employee
- Owner
- Friends
- Church
- Commercial
- Wholesale

Use discounts to provide clerk-independent negative order adjustments for targeted customers. Discount configuration can be **PIN** protected, so clerks cannot randomly apply discounts.

Surcharge Tax

Surcharges are positive adjustments (credits) by definition and can be either percentage or flat amounts. They can also be configured to be taxable or not, and appear on the **VI** and printed invoice in the summary area near taxes. Specific surcharges can be defined by surcharge name that will be automatically applied to every invoice when created. One such surcharge could be an *Environmental* surcharge, used to collect hazardous chemical disposal fees sometimes required by state law. Surcharges can be applied selectively by department, collecting fees for drycleaning only, for example.

Sales Tax

There are several tax configuration settings called authorities. Tax authorities are associated with the customer in the **CV Details** tab. Multiple tax authorities are needed in order to deal with the variations in tax requirements. For example, both a local and State tax might apply in some parts of the USA. While this is uncommon in the USA, it is the norm in countries such as Canada and Australia. Once configured, taxes apply automatically during the creation of an invoice. Tax amounts are always percentage-based with three significant figures to the right of the decimal point (i.e., 6.250).

EXEMPTIONS

While taxes always automatically apply, certain situations call for tax exemptions:

- **By Customer**—Governmental agencies, nonprofit organizations, resale, etc., can be selectively exempt from taxation.
- **By Department**—Services are tax exempt in some states, so departments can be selectively exempt from taxation.

Customer exemptions are assigned in the **CV Details** tab and allow entry of a Tax ID reference number. Department exemptions are assigned during *Price Table* creation.

Order Assembly Options

Manual Assembly

Assisted Assembly

Automated Assembly

SPOT contains various features used to help assemble orders more rapidly, accurately, and efficiently. This section describes available assembly functions and techniques. Since most assembly methods require the use of lot management, the reader is urged to read the Tags & Lot Management section of this guide as well.

Manual Assembly

Manual order assembly process requires visual inspection of printed tag information to reassemble orders and consists two basic methods, preprinted and demand.

PREPRINTED (MANUAL)

This method uses few of SPOT's internal features, relying on pre-manufactured garment tags (called manual tags) made by companies such as Liberty-Pittsburgh, Stry-Lyncoff, etc. Lot control is sometimes built into the preprinted number sequences. SPOT can be configured to track preprinted numbers, but this method often results in much slower assembly since it relies on lot sequence number recognition only. It also introduces an additional preprinted tag number to the reassembly process.

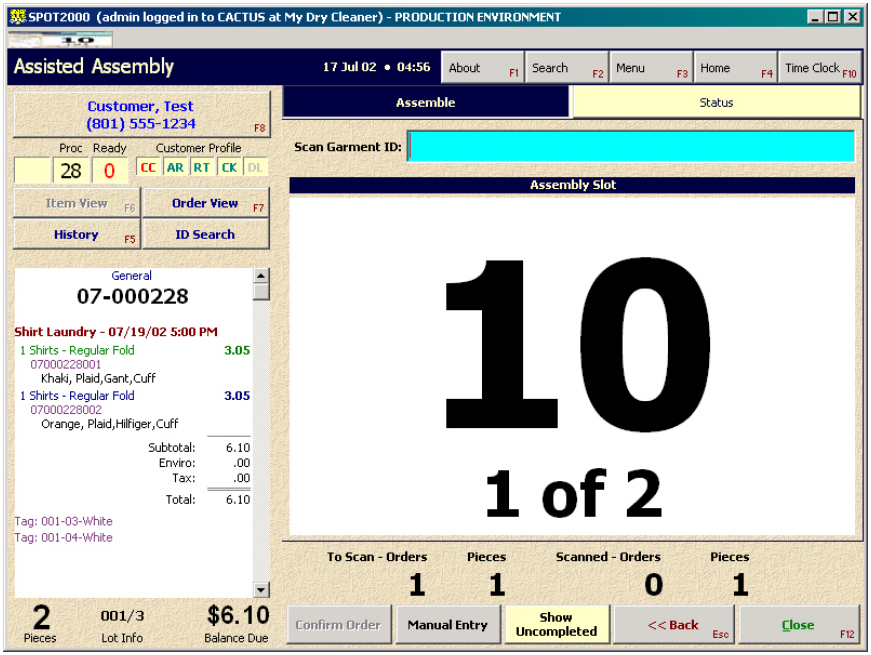
DEMAND

Using SPOT's internal demand tag printing functionality makes the assembly process much faster since a greater amount of information is automatically printed on each garment tag such as customer name, customer phone number, garment type, total number of order pieces, etc. There is also no tag information to input and no additional tag number since each demand tag contains the invoice number, eliminating confusion. Lot control sequences can be defined and automatically printed on each tag to further enhance order production efficiency.

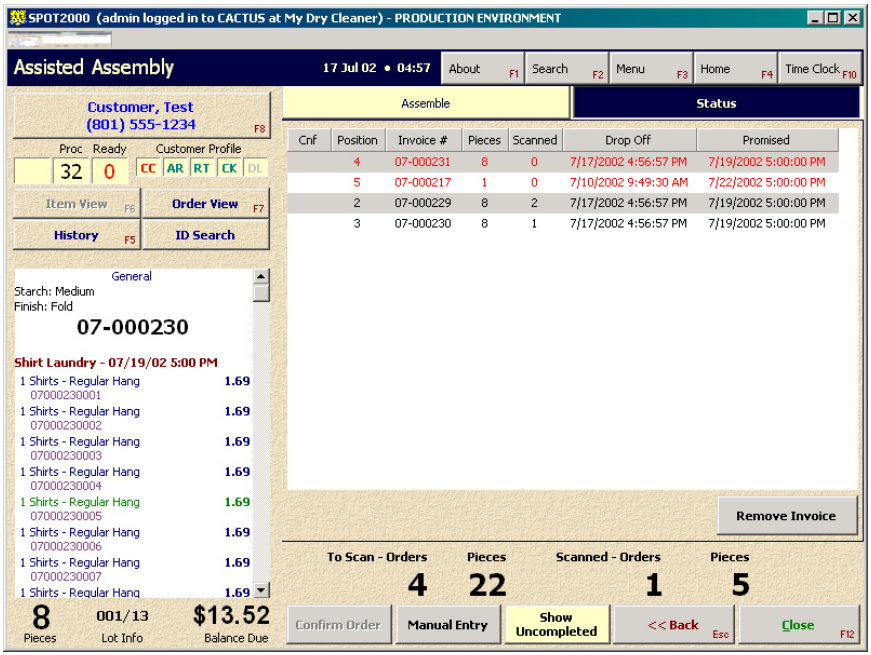
Assisted Assembly

SPOT incorporates a feature used to facilitate manual order reassembly and verification using barcoded item-level tracking. By attaching either a permanent Heat Seal Label (HSL), barcoded demand tag, or RFID chip on each garment and using the *Assisted Assembly* feature, orders are randomly scanned indicating the assembly station to hang the scanned garment on.

The assembly computer monitor display is large enough to see across the length of all assembly stations. The system keeps track of the number of items needed to complete each order, then alerts the assembler when each order is ready for bagging. Status information in large characters shows item count progress for each scanned garment and total order. The *Status* view can be selected at any time to view the overall progress of the lot currently in assembly.



*Assisted Assembly—**Assemble View***



*Assisted Assembly—**Status View***

HOW IT WORKS

Some configuration and setup is required to use the Assisted Assembly function:

- All orders must be prepared with either an HSL label or barcoded paper demand tag.
- Orders must be processed using the SPOT lot control system.
- Assembly station hooks must contain a barcoded station number (available from SPOT Business Systems).
- A wireless barcode reader is typically needed to allow freedom of movement between garments to be assembled and assembly stations.
- An assembly computer station must be added to the network with a large 17" monitor for viewing SPOT generated assembly directives.

Once configured, follow these steps to use:

1. Select the **HP Process Steps button, Assisted Assembly**.
2. The *Assign Orders* view is displayed for order-to-station association.
3. Place each invoice on a station clip.
4. Scan each invoice barcode, then station barcode sequentially.
5. Scan each order and hang on the station indicated on the monitor.
6. Complete #5 above until all orders are assembled.
7. Press the Status view button to view overall assembly progress.

The Assemble view will display the following queueing information:

- White background indicates order not fully assembled.
- Blue background indicates a fully assembled order to bag.
- Red background with an “XX” indicates an order scanned that is not recognized.

Automated Assembly

SPOT is designed to interface to fully automated conveyor systems and currently supports Metal Progetti conveyors. Assembly is fully automatic using either barcodes or RFID tags and requires a manual order bagging station. The SPOT Lot Manager is used to track and manage of all orders on the automated assembly conveyor. Each automated conveyor assembly installation is designed custom. Please contact SPOT Business Systems for assistance or for Metal Progetti contact information.

Route Delivery Management

Route Manager View

Route Delivery

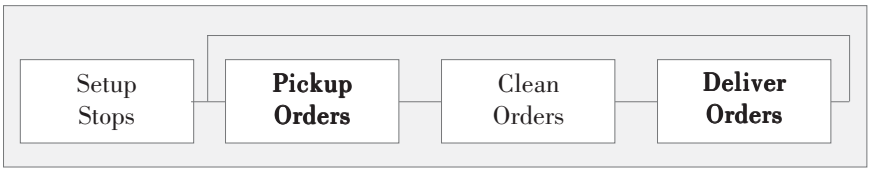
Stop Maintenance

Customer Route Tab

SPOTmap Route Mapping

Electronic Route Manifest

SPOT's versatile route management system is capable of handling any number of routes or stops. Stop management utilities provide a way to add, change, move, and delete customers from route Stop assignments. Changes made to a specific delivery stop list results in automatic re-sequencing of all affected Stop numbers. Route manifests contain detailed listings of orders to be delivered along with delivery instructions and sequenced by route Stop number.



Basic Route Management Steps

Route Manager View

Route Manager View

1 Function Buttons

Search [F2]—Order search function.
Menu [F3]—Lesser used functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

2 Operation Tabs

Production—Order processing functions.
Route—Route utility.
A/R—Accounts Receivable utility.
Reports—Management reporting.
System—System utilities.

3 Route Selection Buttons

Once configured, these buttons allow quick access to each route stop list view. Route selection buttons are user-definable and named by route description with keyboard access numbers [1] - [8]. Press the **Routes (1 of X)** button for additional routes (more exist if X is greater than 1).

4 Route Stop List

Displays the list of stops for the selected route. The route manager allows for commercial customers located in the same building complex to have the same route stop number and is treated as a delivery group.

5 Process Buttons

All process functions listed below are relative to the selected route. Grayed-out buttons are inactive until a stop from the *Route Stop List* is selected. These functions are described in greater detail later in this chapter.

- **Insert Stop**—Allows a customer to be added to the stop list.
- **Edit Stop**—Allows editing of selected stop properties.
- **Remove Stop**—Removes a stop and re-sequences the stop list.
- **Print Bag Tags**—Prints a barcoded ID form for route bag pouch.
- **Customer View [F8]**—Accesses **CV** for customer information edit.
- **Move Stops**—Allows customer(s) to be moved to new stop(s).
- **Print Route Report**—Prints a list of customers sorted by stop.
- **SPOTmap**—Accesses the optional route mapping function.

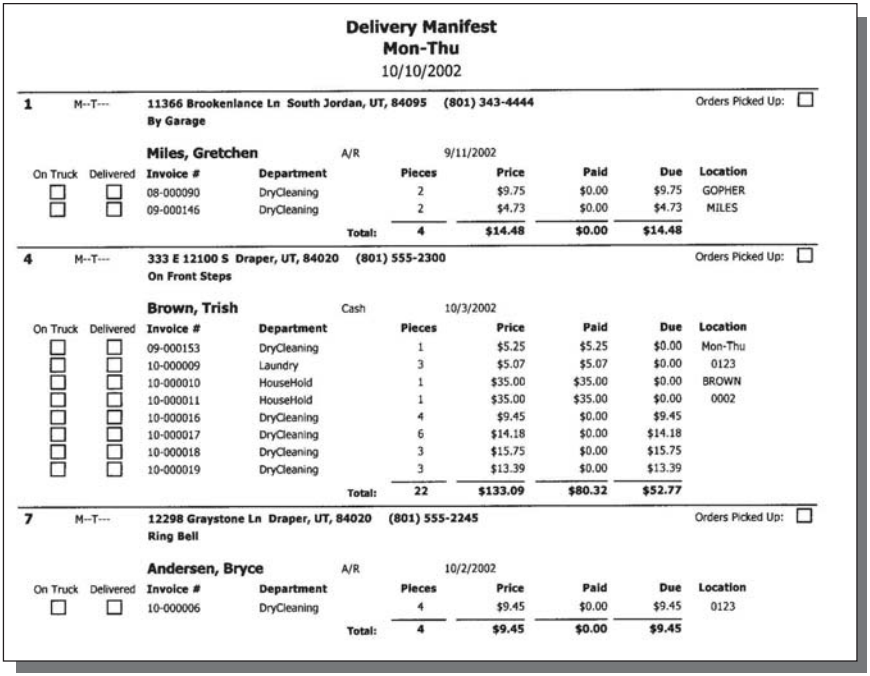
- **Delivery Manifest**—Prints delivery manifest ordered by stop.
- **Post Orders**—Closes all delivered orders.
- **View Orders**—Displays the Search function, listing route orders.
- **Close [F12]**—Exits the Route function and returns to **HP**.

Route Delivery

The route process is fully integrated into SPOT to provide ease of use and unparalleled flexibility. Once a customer has been assigned a route and stop number, the rest of the process is fairly automatic, consisting of four basic steps:

1. Pickup and Detail new orders.
2. Print route manifest, deliver orders.
3. Post delivered orders.
4. Print billing statements on billing cycle.

The optional SPOT Telephony card and software allows the automatic phone calling of route customers the night before order delivery/pickup as a reminder to collect and place new orders in the designated pickup location. The voice message can be customized to suit any need. Telephony activation occurs in the *CV > Reminders > Phone Notification* list.



Delivery Manifest
Mon-Thu
10/10/2002

1 M--T--- **11366 Brookenlance Ln South Jordan, UT, 84095 (801) 343-4444** Orders Picked Up: ☐
By Garage

Miles, Gretchen A/R 9/11/2002

On Truck	Delivered	Invoice #	Department	Pieces	Price	Paid	Due	Location
☐	☐	08-000090	DryCleaning	2	$9.75	$0.00	$9.75	GOPHER
☐	☐	09-000146	DryCleaning	2	$4.73	$0.00	$4.73	MILES
			Total:	**4**	**$14.48**	**$0.00**	**$14.48**	

4 M--T--- **333 E 12100 S Draper, UT, 84020 (801) 555-2300** Orders Picked Up: ☐
On Front Steps

Brown, Trish Cash 10/3/2002

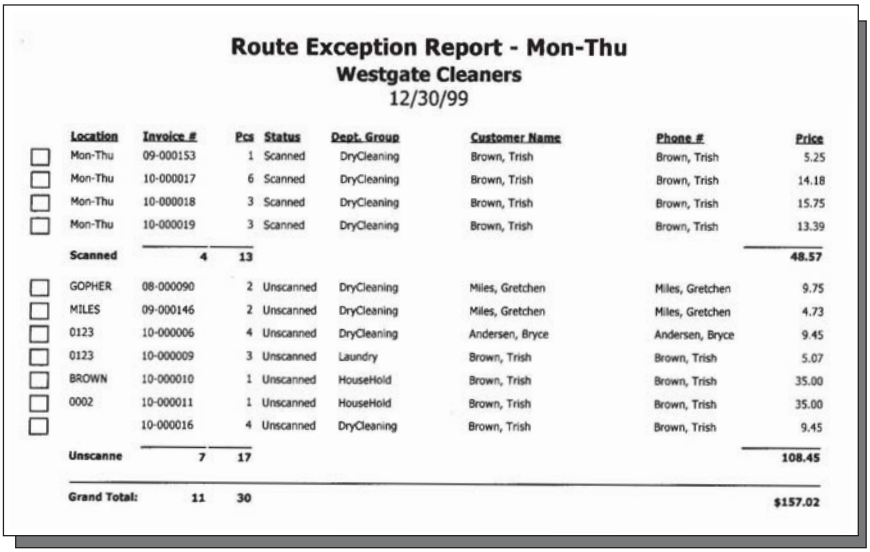
On Truck	Delivered	Invoice #	Department	Pieces	Price	Paid	Due	Location
☐	☐	09-000153	DryCleaning	1	$5.25	$5.25	$0.00	Mon-Thu
☐	☐	10-000009	Laundry	3	$5.07	$5.07	$0.00	0123
☐	☐	10-000010	HouseHold	1	$35.00	$35.00	$0.00	BROWN
☐	☐	10-000011	HouseHold	1	$35.00	$35.00	$0.00	0002
☐	☐	10-000016	DryCleaning	4	$9.45	$0.00	$9.45	
☐	☐	10-000017	DryCleaning	6	$14.18	$0.00	$14.18	
☐	☐	10-000018	DryCleaning	3	$15.75	$0.00	$15.75	
☐	☐	10-000019	DryCleaning	3	$13.39	$0.00	$13.39	
			Total:	**22**	**$133.09**	**$80.32**	**$52.77**	

7 M--T--- **12298 Graystone Ln Draper, UT, 84020 (801) 555-2245** Orders Picked Up: ☐
Ring Bell

Andersen, Bryce A/R 10/2/2002

On Truck	Delivered	Invoice #	Department	Pieces	Price	Paid	Due	Location
☐	☐	10-000006	DryCleaning	4	$9.45	$0.00	$9.45	0123
			Total:	**4**	**$9.45**	**$0.00**	**$9.45**	

Partial Route Manifest Report



Route Exception Report - Mon-Thu
Westgate Cleaners
12/30/99

	Location	Invoice #	Pcs	Status	Dept. Group	Customer Name	Phone #	Price
☐	Mon-Thu	09-000153	1	Scanned	DryCleaning	Brown, Trish	Brown, Trish	5.25
☐	Mon-Thu	10-000017	6	Scanned	DryCleaning	Brown, Trish	Brown, Trish	14.18
☐	Mon-Thu	10-000018	3	Scanned	DryCleaning	Brown, Trish	Brown, Trish	15.75
☐	Mon-Thu	10-000019	3	Scanned	DryCleaning	Brown, Trish	Brown, Trish	13.39
	Scanned	**4**	**13**					**48.57**
☐	GOPHER	08-000090	2	Unscanned	DryCleaning	Miles, Gretchen	Miles, Gretchen	9.75
☐	MILES	09-000146	2	Unscanned	DryCleaning	Miles, Gretchen	Miles, Gretchen	4.73
☐	0123	10-000006	4	Unscanned	DryCleaning	Andersen, Bryce	Andersen, Bryce	9.45
☐	0123	10-000009	3	Unscanned	Laundry	Brown, Trish	Brown, Trish	5.07
☐	BROWN	10-000010	1	Unscanned	HouseHold	Brown, Trish	Brown, Trish	35.00
☐	0002	10-000011	1	Unscanned	HouseHold	Brown, Trish	Brown, Trish	35.00
☐		10-000016	4	Unscanned	DryCleaning	Brown, Trish	Brown, Trish	9.45
	Unscanne	**7**	**17**					**108.45**
	Grand Total:	**11**	**30**					**$157.02**

Route Exception Report

PRINTING DELIVERY MANIFESTS

When a driver is ready to begin his delivery route for the day, a delivery manifest is printed for that route. The manifest is ordered by stop number. Stop numbers should be sequenced to provide the shortest drive time. Control over stop sequence is provided by the built-in stop maintenance functions. Use the **Delivery Manifest** button to print a delivery manifest for the selected route.

Typically, orders are loaded onto the delivery truck sequenced by stop sequence for increased delivery efficiency. The route manifest can be of help with this process in addition to validating the presence of all loaded orders. The manifest is then used to drive from stop-to-stop, with the route driver adding checkmarks to indicate completion status:

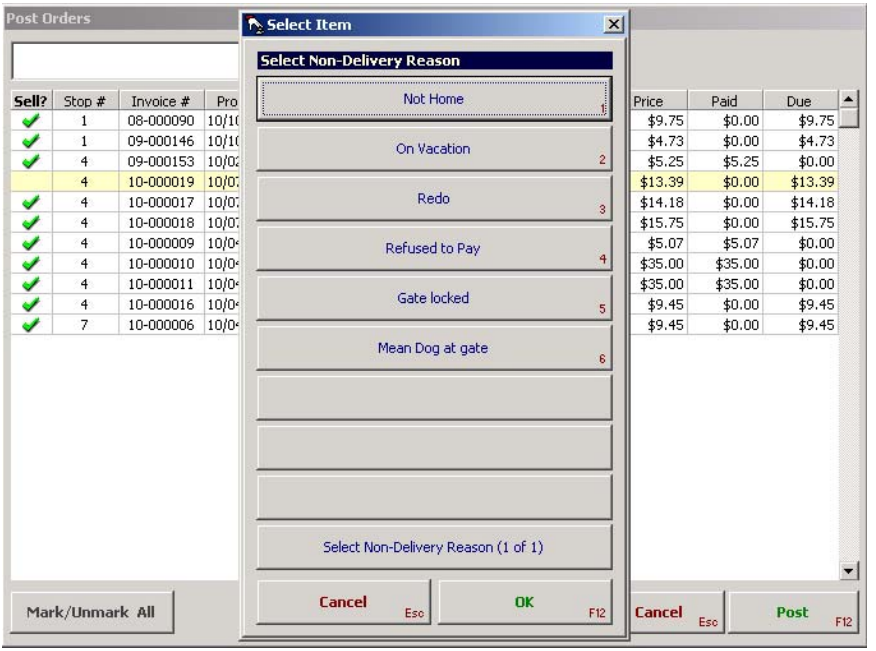
1. Delivery destination reached.
2. Verification of each order delivered.
3. Acknowledgment of orders picked up.

The printed route manifest includes the following information:

- Route Name and Date
- Customer Stop Number
- Customer Name and Address
- Payment Method
- Invoice Number and detail
- Amounts Paid and Due
- Delivery and Pickup Checkboxes
- Delivery Instructions

Route Delivery Verification

A process control step can be defined within SPOT allowing orders to be verified by scanning each onto a route truck. The result of this process step is a *Route Exception* report showing all orders scanned as expected as well as those missing. The printed report can then be used to locate the missing orders checkmarking each found. This verification step is invaluable for ensuring that all completed orders are properly loaded for delivery.



Post Orders View with Non-Delivery Reason Dialog

POSTING DELIVERED ORDERS

This final step in the route delivery process automatically reconciles undeliverable orders, then posts and closes all delivered orders. Checkmarks indicate orders will be posted. All orders are initially checkmarked. From the Route view, select **Post Orders** to display the Post Order dialog.

Scanning Undeliverable Orders

Undeliverable orders are manually unmarked or scanned preventing the order from posting as closed. The **Mark/Unmark All** button provides a quick way to override selectively marked orders when all orders are known to be delivered for the selected route. Upon return from route delivery, undeliverable orders are scanned at the *Post Order* view. The user is then prompted to indicate if the selected order or all orders for that customer are undeliverable. A non-delivery reason is entered (user-definable reason list) and rescheduled delivery date assigned.

Posting Orders

Select the **Post [F12]** button from the Post Orders view to begin the posting process. As each order is posted line by line, posted orders are grayed-out with strike-out lines providing positive visual feedback of posting. Undelivered (non-posted) orders are queued for the next delivery attempt.

Payment Types

There are several methods of payment supported by the Route Manager. There is an important action precedence with **CCOF** and **A/R** use. A route customer is always an **A/R** customer by default. If payment by **CCOF** is activated via the **CV A/R - CC** tab (*Route Precedence* dropdown) and the customer **CC** is declined by the payment processor, SPOT automatically posts the declined amount to **A/R**. For all methods other than cash collected by COD, the posting process handles everything automatically.

- **On Account**—Posted orders are directly charged to the customer **A/R** account automatically for all route customers by default. Once posted to **A/R** the unpaid order amount then appears for payment on the next statement billing cycle.
- **Credit Card On File (CCOF)**—If activated, posted order amounts are automatically charged to a **CCOF** within the system (**CCOF** card number is entered in the **CV General** tab). Standard **CC** payment processing can be performed in immediate (real-time) or batch (end of day) modes by configuration selection.
- **On Account by Credit Card**—For customers who prefer one billing statement each month rather than a **CC** transaction on each delivery, use the **A/R** pay by **CCOF** feature. This allows orders to be accumulated over the billing period, then paid automatically by **CCOF** ensuring prompt payment, saving payment delays and transaction fees.
- **Cash (COD)**—For cash control reasons, COD orders are reconciled using the standard order Pickup processing function from any available terminal with a cash drawer.

Sample Bag Tag

PRINTING BAG TAGS

The Route Manager view **Print Bag Tags** button displays a dialog used to print a special form containing route customer information and a reference barcode number. This printed form is optionally placed inside the clear plastic pouch on a route bag to identify the customer and provide rapid barcoded selection during the Detail process. For convenience, the **CV** also contains a **Print Bag Tag** button.

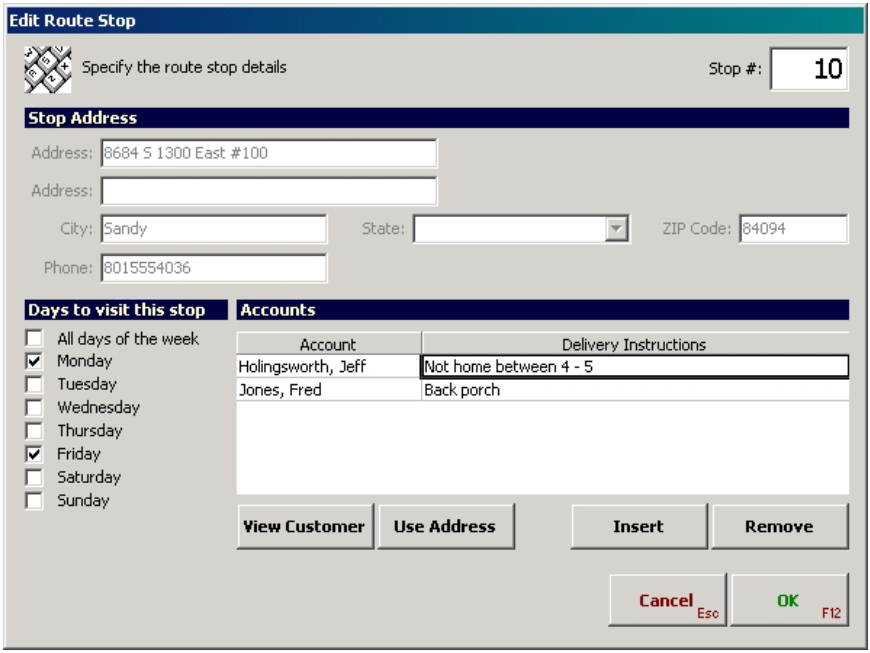
Stop Maintenance

The Route Management view contains several buttons to help deal with maintaining route stops. Use these basic steps to establish a new route:

1. Define each route by name (configuration change).
2. Assign customers to a route and stop.
3. Establish customer for **A/R** or **CC** payment.
3. Define stop sequences for most efficient delivery path.

INSERT NEW STOP

This function, accessed via the **Insert Stop** button, allows for the insertion of a new customer stop. The **CL** view allows selecting a customer then displays the Edit Stop view. If an insertion stop is not highlighted prior to pressing this button, the new order is inserted at the beginning of the list automatically. Listed orders appearing after the inserted stop are automatically re-sequenced with new stop numbers.



Edit Route Stop View

EDIT EXISTING STOP

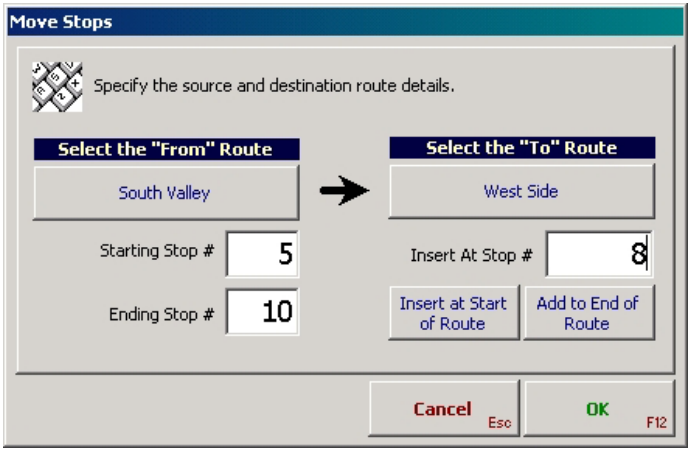
This function is accessed via the Route Manager view **Edit Stop** button. Multiple customers can be added to a single stop along with delivery instructions. Re-sequencing of stop numbers occurs automatically.

Edit Route Stop View

- **Assigned Stop # Field**—Displays currently defined stop number.
- **Stop Address**—Customer delivery address information.
- **Days To Visit This Stop**—Checkmark each day in which a delivery is to stop at this location for dropoffs and pickups. Usually, routes are established by day or truck.
- **Accounts**—Add as many delivery accounts to the selected stop as required. This is typically used for commercial deliveries to multiple occupancy buildings. Contents of the Delivery Instruction field are user-definable and appear on the delivery manifest.
- **View Customer Button**—Provides instant access to the **CV** for the selected customer.
- **Use Address Button**—Used for multiple accounts at the same delivery address, this button allows a selected account in the list to be used as the default delivery address for the stop.
- **Insert/Remove Buttons**—Used to add or delete a selected account.

REMOVE EXISTING STOP

The function is accessed via the Route Management view **Remove Stop** button. It allows the highlighted customer stop in the list view to be deleted. Orders are automatically resequenced when a stop is removed.



Move Stop Dialog

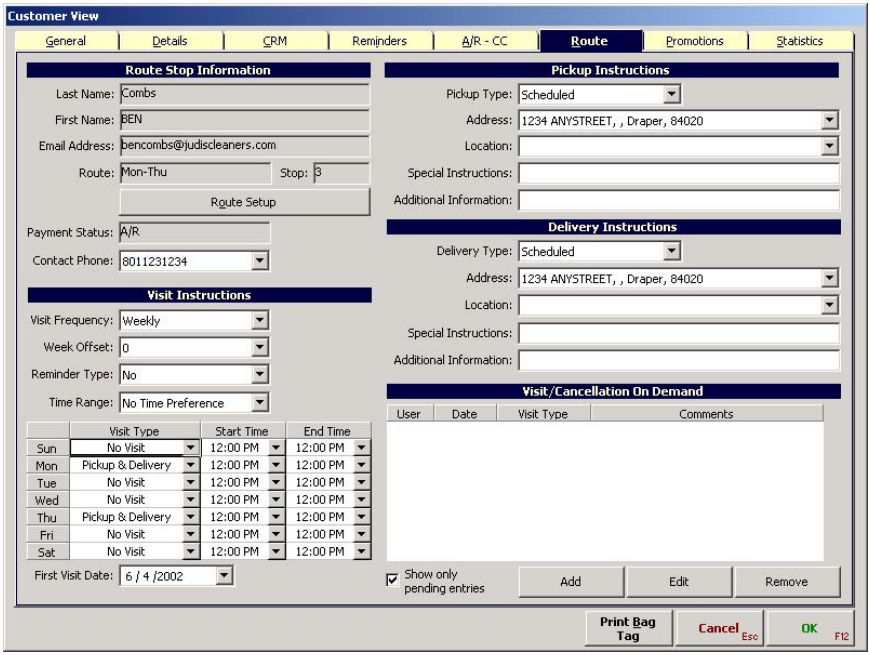
MOVING STOPS

Access this function via the Route Management view **Move Stops** button. A single stop or a range of stops can be moved within the selected route or to a new route. Orders are automatically resequenced across all affected routes when stops are moved or renumbered.

Move Stop Dialog

As an example, it is possible to move stops 3–6 in route #1 and insert them at the stop 12 position of route #2. Or, move stops 3–6 in route #1 to stop 12 in route #1. This function provides a great deal of flexibility when expansion forces customer reassignment to new routes.

- **Select the "From" Route**—Select route (button), start and stop number as the source stops. Select a range or enter the same stop in both fields to move a single stop only.
- **Select the "To" Route**—Select route (button) and insertion stop number as the destination. Use **Insert at Start of Route** or **Add to End of Route** buttons to force the insertion point at the beginning or ending of the destination route.

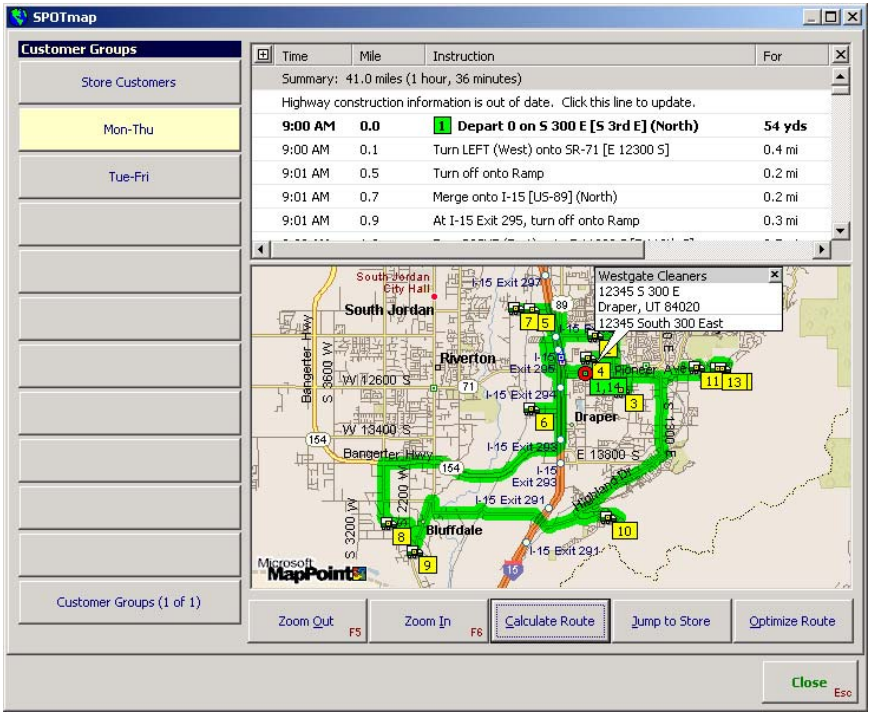


Customer Route Tab

Customer Route Tab

The **CV Route** tab contains much of the same information found in the Route Manager but organized to expose customer specific route functions. Changes made in this tab are reflected in the Route Manager and visa versa. Commonly used for customer service help desks or to assist with customer requested route changes, this tab provides instant access to critical route functions such as *stop* information; *Visit*, *Pickup*, and *Delivery* instructions; and *Demand* schedule changes.

- **Route Stop Information**—Contains stop-specific information.
- **Visit Instructions**—Expanded instructions for visiting a stop. Allows visits to be skipped or delayed and exposes the delivery schedule by type and time.
- **Pickup Instructions**—Expanded instructions for pickups.
- **Delivery Instructions**—Expanded instructions for deliveries.
- **Visit/Cancellation On Demand**—Handle on-demand route customers. The **Add** button adds a stop pickup or delivery, the **Edit** button allows changing the selected demand stop, and the **Remove** button deletes a selected stop.



SPOTmap Route Mapping Utility

SPOTmap Route Mapping

SPOTmap is selected from the Route view by pressing the **SPOTmap** button. The *SPOTmap* view locates all stops on the selected route and places each on the displayed map. Two buttons **Zoom In** and **Zoom Out**, provide access to map detail. Note that only stop addresses found in *SPOTmap*'s national address database will be displayed, all others must be resolved manually. NOTE: Microsoft Map Point 2002 is required.

DRIVING INSTRUCTIONS

The **Calculate Route** button allows *SPOTmap* to display a list of driving instructions ordered by stop for the selected route along with a driving path (in green) based on the current customer stop settings. Driving instructions include total estimated distance and drive time as well as estimated distance and drive time for each turn between route stops. This can be very useful for new routes and new route drivers. Substitute route drivers can use this to minimize drive times on an unfamiliar route. Driving instructions can be printed.

STOP IDENTIFICATION

Pointing a mouse at a stop for more than a second displays the stop address in large viewable characters. The **Jump to Store** button places the route distribution store/plant at the center of the map view. This is helpful to relocate the route store/plant after zooming between stops.

STOP OPTIMIZATION

The most useful feature of *SPOTmap* is its ability to optimize routes for right-hand turns. Wait time for right-hand turns is usually much shorter than for left-hand turns. By optimizing for right hand turns, considerable drive time may saved. The **Optimize Route** button forces *SPOTmap* to look at each stop address, determine the shortest distance between each, then optimize travel time by selecting as many right-hand turns as possible. Once the process is complete, *SPOTmap* displays a dialog showing the original estimated route travel time between stops compared against the new optimized time and the estimated time saved by optimizing. It then prompts to automatically re-sequence existing stop numbers in the route list to reflect the suggested optimization. Note that manual stop reassignment can be made at any time, even on an optimized list. Automatic list optimization re-sequencing can be aborted to print the optimized route list and test the proposed new stop list prior to making permanent stop order changes.

Accounts Receivable

A/R *Processing*

Customer **A/R** *Setup*

Posting Orders at Pickup

Printing Statements

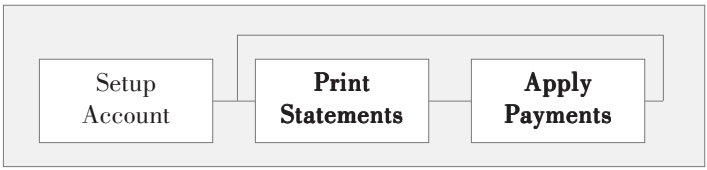
Applying Payments

Applying Adjustments

A/R Reporting

Statement Printers

The Accounts Receivable function is available via the **HP** System *tab. SPOT provides the utmost in efficiency with a built-in, fully integrated Accounts Receivable (***A/R***) system that makes handling in-house charge accounts simple and fast.* **A/R** *support for both counter and route customers is available. Master and sub-master accounts are supported to provide individual and consolidated billing statements. Accounts can be paid by mail remittance or immediately by Credit Card On File (***CCOF***). Everything needed to handle an unlimited number of account customers is fully integrated into SPOT.*



Basic accounts receivable steps

*Accounts Receivable (**A/R**) Menu View*

A/R Processing

Since the Accounts Receivable (**A/R**) functionality is tightly integrated into SPOT, handling house accounts is fairly straight forward, consisting of the following basic steps (each step is discussed in greater detail later):

1. Set up a customer for **A/R** charges.
2. Charge orders to account via Pickup or Route posting.
3. Print billing statements.
4. Apply adjustments to **A/R** account (optional).
5. Apply payments received against outstanding amounts due.

CENTRALIZATION

In addition to handling **A/R** accounts for individual stores, SPOT's centralized architecture allows customers who shop at more than one store to receive a single consolidated monthly billing statement. Statements can be printed from any location in the centralized network for a single store or all store locations. This is a truly no-compromise solution to managing accounts across many stores.

BILLING CYCLE CONVENTIONS

A/R billing cycles consist of a starting and closing date. By default, the system will automatically set the starting date as the closing date of the previous billing print run cycle. The closing date is selected by the user. Any account transaction posted up to, but not including the closing date are shown on the statement. Orders posted on the closing date are included on the next statement print run. An example will help explain this logic.

Assume the statement cycle is the first day (1st) through the last day (30th) of the month of November. Setting the closing date to "December 1st" ensures that the statement run will include all orders posted through November 30th but none on December 1st. Also take note that the physical date you run statements must be at least on the closing date (or later) , or some orders might not be included in the billing statement until the next cycle. For this reason, the best convention for billing cycles is as follow:

- **Every Week**—1st through 8th, 8th through 16th, etc.
- **Every Two Weeks**—1st through 16th, 16th through 1st
- **Every Month**—1st through 1st

Since the billing cycle closing date is definable, any number of billing cycles in a month is allowable as long as the closing date is chosen appropriately.

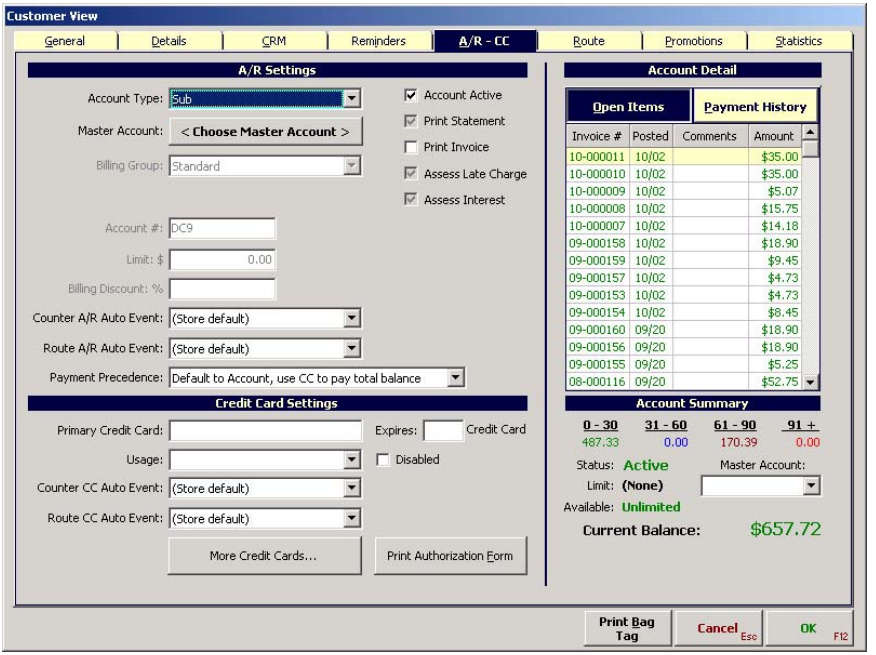
Customer A/R Setup

Enable a customer to charge orders on account from the **CV A/R - CC** tab view (for field definitions, see *Customer Management* chapter). Use the following steps to setup an **A/R** customer:

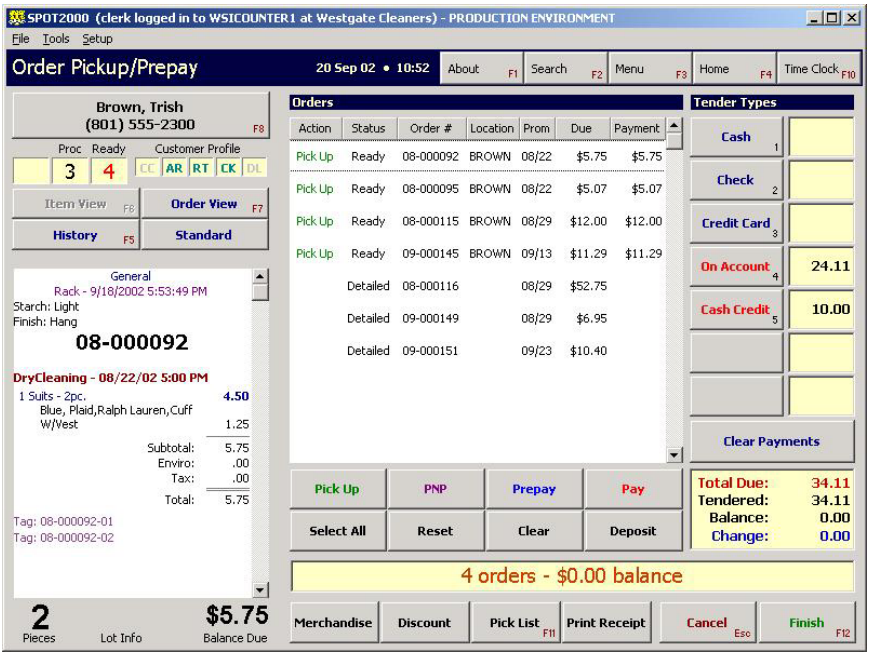
1. Select either a Master or Sub master account type.
2. Enter the account number, charge limit, and billing discount.
3. Make sure the account is active and will print statements.
4. Select **A/R** and **CC** tender precedence.
5. Select Event types for counter and route charge posting.

A/R AND CC PRECEDENCE

Customers configured for order payment by both **A/R** charging and Credit Card On File (**CCOF**) charging require a declaration of use precedence. The **CV A/R - CC** tab *Tender Precedence* dropdown defines how **A/R** and **CC** tender type buttons behave in the Pickup view. Choices in this dropdown define the actions allowed.



*Customer View (**CV**) View—**A/R** Tab*



*Order Pickup View with **A/R** Tender Type*

- **Default to CC, use Account on CC decline**—Automatically selects the order Pickup **CC** tender button for payment assuming the card is valid. If declined, the order pickup amount is posted to **A/R** after a prompt to the clerk indicating the problem. The system also allows an alternate **CC** to be entered via the Magnetic Swipe Reader (MSR) in an attempt to resolve the declined card.
- **Default to Account, use CC to pay total balance**—Automatically selects the order Pickup **A/R** tender button for payment posting to a charge account. If the automatic **CCOF** payments option is used, **CCOF** will be used to pay the total statement balance.
- **Default to Account, use CC to pay overdue balance**—Automatically selects the order Pickup **A/R** tender button for payment posting to a charge account. If the automatic **CCOF** payments option is used, **CCOF** will be used to pay only overdue statement balances (invoices open for 30 days or more).

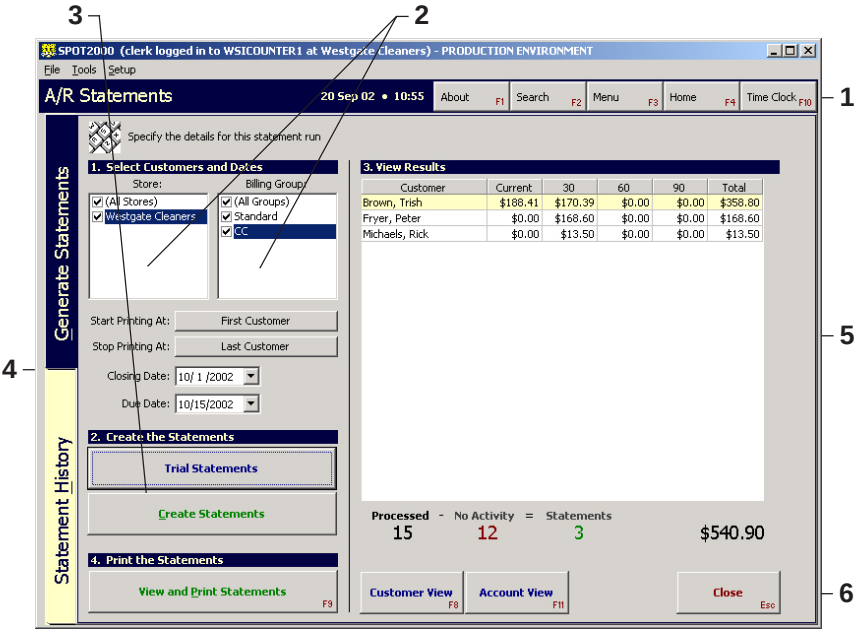
A/R POSTING EVENTS

SPOT provides an efficient method for automatically posting **A/R** payments at any order processing step, called an *Event*. **A/R** events can be assigned to a counter or route customer. Note that the use of these settings are only applicable if customer events differ from the preset store events. The following two dropdowns provide this ability.

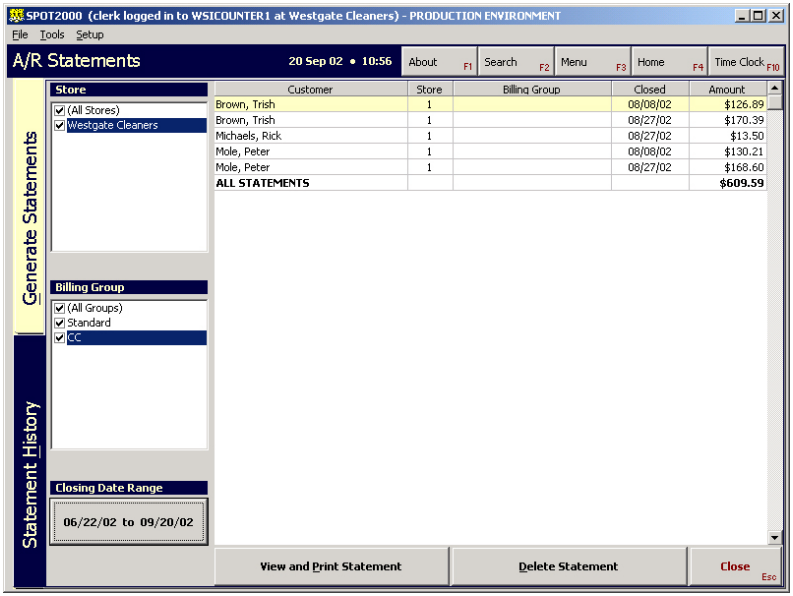
- **Counter A/R Auto Event**—This is a counter customer event. It is customary for counter orders to be paid at pickup only; however, this dropdown is used to establish the step at which a counter order is automatically posted to **A/R** (Dropoff, Rack, or Pickup).
- **Route A/R Auto Event**—This is a route customer event. Normally, route orders are paid for by **A/R** or **CCOF** after delivery; however, this dropdown is used to establish the step at which a route order is automatically posted to **A/R** (Dropoff, Rack, or Pickup).

Posting Orders at Pickup

Order posting process is automatic at order Pickup. If a customer is established as a house account, it is assumed that the majority of order pickups will be on account. For this reason, during the order pickup process, the total amount due is automatically shown in the tender field next to the **A/R** tender button in preparation for order completion. Pressing the **Finish [F12]** button closes and posts selected order amounts to account. Pressing the **Clear All** button prior to the **Finish [F12]** button clears all tender types and amounts (including the automatically selected **A/R** tender) allowing any other tender to be selected as an alternative.



*A/R—**Statement Tab***



*A/R—**History View***

Printing Statements

This view is selected from the **HP System** tab, **A/R Statements [C]** button. Each function header is numbered on screen showing the order in which the user should proceed toward final statement printing. Note that prior to using this function, configuration of certain fields must be established. PNP orders (picked up not paid for) are not posted to statements until they are paid for using the order Pickup process step. PNP orders remain in process (even though picked up) until payment is made.

GENERATE STATEMENTS TAB

1 Function Buttons

Search [F2]—Order search function.
Menu [F3]—Lesser used functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

2 Select Customers and Dates

- **Store**—In centralized systems, statements can be run by individual store or selected stores in the network. Uncheck the "(All Stores)" checkbox to select any store or group of stores.
- **Billing Group**—Selects a user-defined billing group. Billing groups are used to divide statement printing into smaller and more manageable units, such as Insurance Agencies, **CC** billings, and Standard billings. Uncheck the "(All Groups)" checkbox to select any group or range of groups.
- **Start Printing At**—Allows statement printing to begin with a specific customer. If not set to a specific customer, it uses the first customer in the View Results list.
- **Stop Printing At**—Allows statement printing to end with a specific customer. If not set to a specific customer, it uses the last customer in the View Results list.
- **Closing Date**—This date sets the ending range for statement order inclusion. Orders posted through and including the day prior to this date are included in the statement run. Orders posted on this date are not included.
- **Due Date**—This date is printed on each statement as a reminder to your customer of the payment remittance due date.

3 Create the Statements Buttons

- **Trial Statements**—This button uses the information discussed above to run optional trial posting, listing each statement line by line in the View Results list. No statements are actually created. Note that this optional validation step is used only to preview a statement run prior to actually creating statements.
- **Create Statements**—Once the trial balance is determined to be accurate (optional step), this button uses the information established above to calculate and post statements to **A/R**.

4 Print the Statements Button

- **View and Print Statements [F9]**—Begins the physical statement printing process and switches to the Statement History tab.

5 View Tabs

- **Generate Statements Tab**—The default tab for the main **A/R** view. It contains all of the steps necessary to run trial statements then post actual statements.
- **Statement History Tab**—Allows viewing of each statement as it appears for printing in the current statement run or on previously printed statements. Printing and reprinting of statements also occurs from this screen.

6 View Results List

This list provides a customer by customer preview list of statement activity. Statements with no amount due and no activity will not print unless configured to do so. A statement run summary provides a visual indication of the number of actual statements to be included in the final print run. Activity status at the bottom of the list shows the following:

- **Processed**—Displays the total number of accounts processed.
- **No Activity**—Displays the number of accounts with no activity.
- **Statements**—Displays the number of statements created.
- **Total Amount**—Displays the value of statements created.

7 Process Buttons

- **Customer View [F8]**—Displays **CV** General tab.
- **Account View [F11]**—Displays **CV A/R** tab.
- **Close [Esc]**—Exits statement printing function back to **HP**.

STATEMENT HISTORY TAB

When printing statements from a normal statement run, the *Store*, *Billing Group*, and *Closing Date Range* are automatically selected from the *Generate Statements* activity (printable orders appear in the list).

- **Reprint/View Previous Statements Button**—To view or print previous statements, select the *Statement History* tab directly, set the *Store*, *Billing Group*, and *Closing Date Range* (for the period in which the historical statement was run). The list of statements for that period will appear in the list. Select a statement to view or reprint from the list and press *View and Print Statement*. Note that selecting the "*All Statements*" line will allow reprinting of all statements for the selected range.
- **Delete Statements Button**—This is not a commonly used button, but allows for the permanent deletion of posted statements. It is normally used just after a statement run when one or more statements require an adjustment and reprinting. The delete function works by selecting the customer first, then selecting the *Delete Statement* button.

  NOTE: While historical statements can be deleted, be aware that all statements existing chronologically after the selected statement will be deleted as well. If statements are deleted in this fashion, all statements for each subsequent month must be rerun for the same customer in order to make statement history chronologically complete.

STATEMENT PRINTING PROCESS

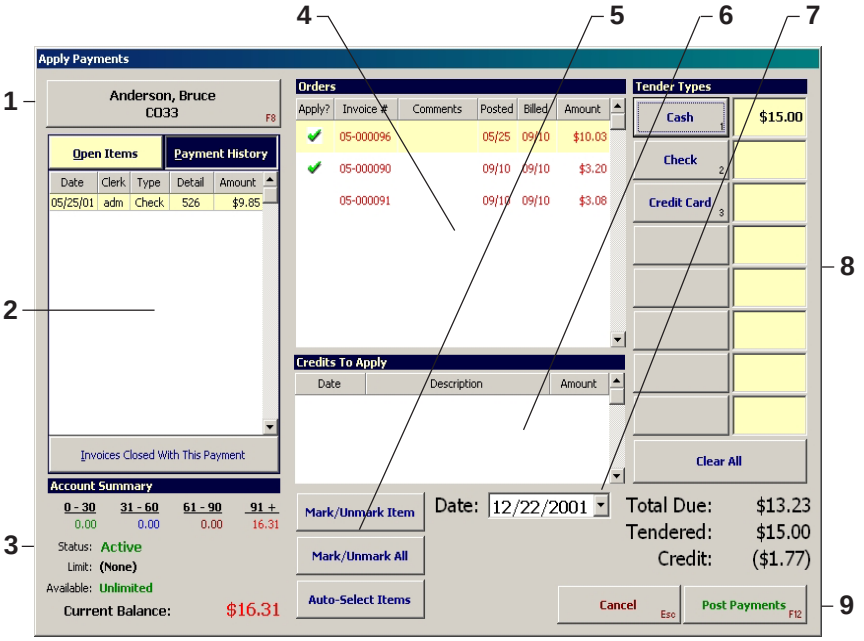
The process of printing statements is straight forward and consists of these basic steps:

1. Select billing store(s) and group(s).
2. Select print range by customer (optional).
3. Select closing and due dates.
4. Run trial balance and verify (optional).
5. Create actual statement run.
6. Print statements.

Trial balances can be run and rerun as many times as necessary without affecting posted balances. Once statements are printed, posting is permanent. Use the **A/R** Apply Adjustments button to make necessary changes.

STATEMENT REPRINTING

The Statement History tab provides a statement preview button which displays each statement the way it will print on paper and allows for reprinting previously generated statements.



Apply Payments View—***Using Remittance Check by Return Mail***

Applying Payments

This view is selected from the **A/R** Apply Payments [A] button. This view is similar to the Pickup view, but with the **VI** replaced by account information. Most tender types are allowed as payment on account including cash, check, **CC**, and **CCOF**.

APPLY PAYMENTS VIEW

1 Customer Button

Displays the selected customer and provides direct access to the **CV**.

2 Account Information

- **Open Items List Tab**—This default view lists all open unpaid orders. Each line of the Open Items list conforms to aging color coding *(Account Summary)* and provides instant identification of order account status. Order aging color codes are: **Green** (0–30 days); **Blue** (31–60 days); **Maroon** (61–90 days); **Red** (90+ days).
- **Payment History List Tab**—Provides a history of all past payments for the selected customer.

3 Account Summary

Shows **A/R** color coded account aging, current account activity status (active or inactive), **A/R** credit limit, available against credit limit, and current balance due for the selected customer.

4 Orders List

Outstanding orders awaiting payment are listed here; top down, oldest to most recent. Checkmarks indicate orders to apply payment against.

5 Order Selection Buttons

These buttons operate on the contents of the Orders list. Marked items in the list appear with a checkmark if included for payment application.

- **Mark/Unmark Item**—Marks or unmarks the selected order.
- **Mark/Unmark All**—Marks or unmarks all orders in the list.
- **Auto-Select Items**—Resets the order list to its originally displayed settings. Used to undo changes made to marked items.

6 Credits to Apply

Outstanding credits are displayed in this list. Credits are applied automatically as a result of overpayment, statement discounts, etc.

7 Effective Post Date

This is automatically set to the current date. It can be moved backwards, forcing payments to show on the previous statement month, if desired.

8 Tender Types

Tender type selection buttons and amount display fields are used to describe the type of payment made on account.

- **Clear All Button**—Removes selected tender types and clears the related amount fields.
- **Total Due**—Displays the total for orders checkmarked in the Orders List.
- **Tendered**—Displays the total of payments received plus credits.
- **Balance/Credit**—Displays the difference between total due and tendered amount. This label will show as **Credit** if the difference results in an overpayment. The credit will be shown on the next statement and applied on the next apply payment session.

9 Process Buttons

- **Cancel [Esc]**—Exits statement printing function back to **A/R** view.
- **Post Payments [F12]**—After all orders are properly marked, this button posts the payment then closes the apply payments session.

APPLY PAYMENT RULES

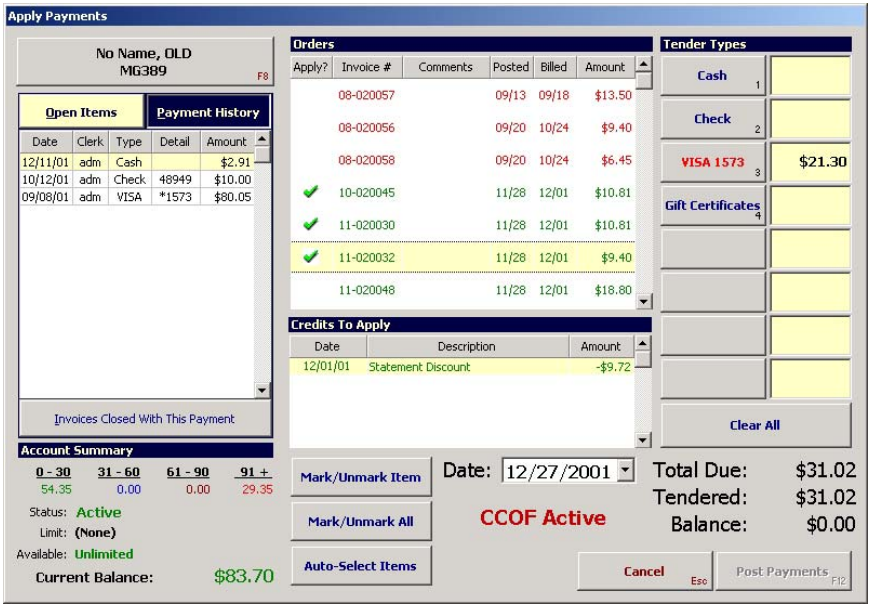
There are three methods of payment application depending on configuration and preference (as discussed next). Methods can be mixed. The following are important rules of the Apply Payment process.

- **Application Priority**—SPOT is an *Open Order* system that attempts to automatically apply the entered remittance amount, applying payment to the oldest open orders first. Automatic invoice selection can be overridden by checking/unchecking listed orders.
- **Full Amounts Only**—Payments are applied in full to total order amounts only and never apply partially. Leftover payment balances show up as credit amounts on the next printed statement and carried forward for application with the next received payment.
- **Minimum Remittance**—Order posting can not occur if the remittance amount is less than the order amounts checkmarked for payment.
- **Overpayments**—If cash is received as payment on account with a resulting overpayment, the system prompts for the option to receive the overpayment as change back from the cash drawer or posted as a credit on the next statement (assumes customer may be present).
- **Immediate CCOF Mode**—When using the **CCOF** for automatic account payment, using the "Immediate" **CC** mode may be slow since the system obtains dialup authorization for each payment. To speed up the **CCOF** payment application process, it is recommended the "Batch" **CC** mode be used. Here, payments are saved for batch processing at the end of the day.

Remittance Based

Payment application is based on mailing statements to be paid at a later date by mail remittance, usually check. Both cash and standard **CC** tenders could be used, but unlikely since the customer must be present. This type of payment application occurs one customer at a time.

1. Select the **Apply Payment [A]** button from the **A/R** view.
2. Select the account customer submitting payment from **CL.**
3. Select tender type (cash, check, **CC**), usually check.
4. Enter the remitted amount and check number.
5. The system marks orders automatically, oldest first, until the full amount is applied to whole orders only. Leftover amounts are shown as credits carried forward to the next statement.
6. Manually mark/unmark orders based on payment instructions (Note: Press the **Auto-Select Items** button to return to marked defaults).
7. Post orders using the **Post Payments [F12]** button.



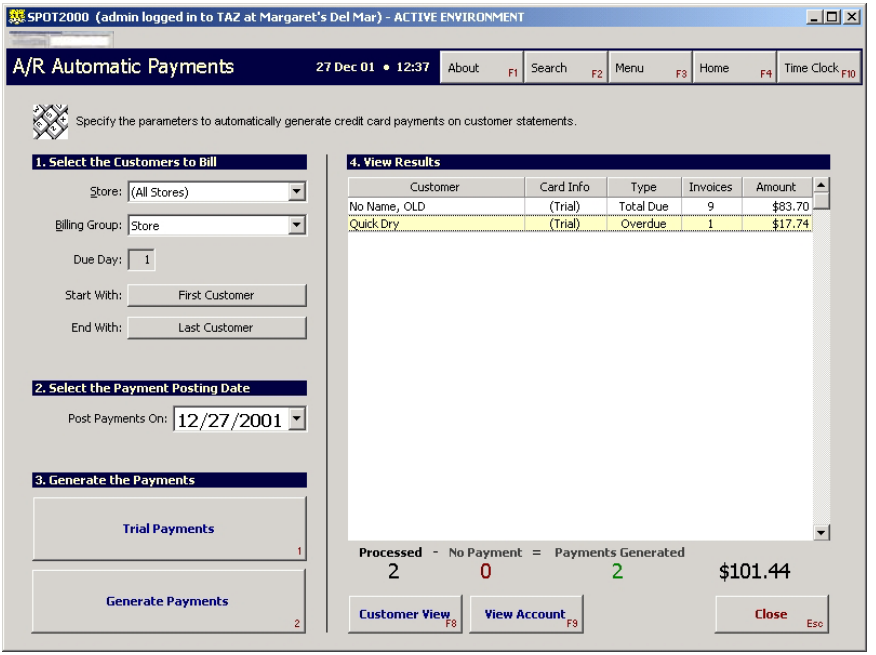
*Apply Payments View—**Using** **Manual CC**OF***

Manual CCOF Based

This payment application method is based on using **CCOF** to pay the entire statement in full rather than waiting for mailed remittance by check. In this case a statement is sent to the customer indicating the statement detail, but showing a zero balance with payment made by **CCOF**. The statement becomes a receipt with no further action required by the customer.

This view is slightly different from that of remittance-based payment application. In this case, the **CC** tender button displays the issuer name of the **CC** (Visa, MC, Amex, etc.) plus the last four digits of the **CCOF.** It also shows ***CCOF** Active* in red to signify a **CCOF** customer. This type of payment application occurs one customer at a time.

1. Select the **Apply Payment [A]** button from the **A/R** view.
2. Select the account customer submitting payment from **CL.**
3. Press the **Mark/Unmark All** button. The system marks all orders in the list and displays the total in the **CCOF** tender display field.
4. Post orders using the **Post Payments [F12]** button, charging the entire outstanding balance to the **CCOF**. Printed statements indicate invoice detail with zero balance due paid by **CCOF**.



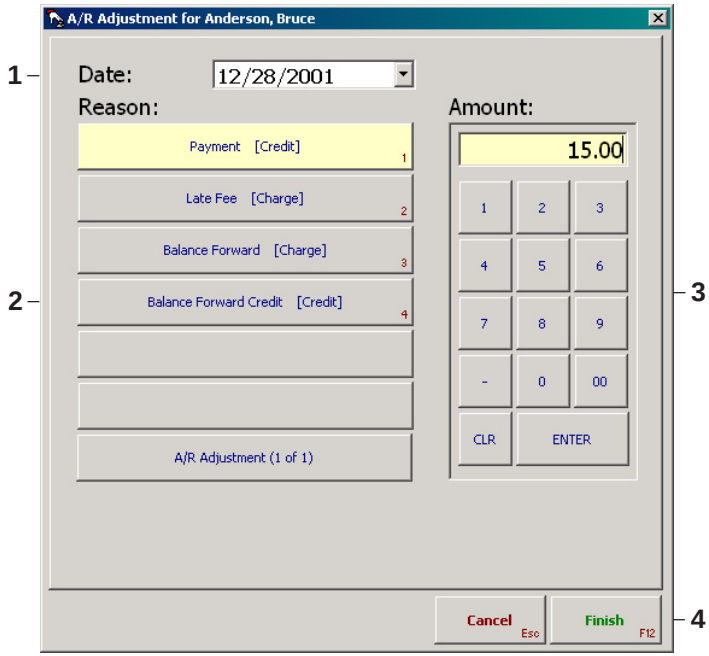
*Apply Payments View—**Using** **Automatic CCOF***

Automatic CCOF Based

Select from **A/R** **Automatic CCOF Payments [D]** button. This payment application method is also based on using **CCOF** to pay the entire statement in full rather than waiting for a remittance (as in the manual method). But, rather than handling one statement application at a time, this method selects all **CCOF** customers and processes the resulting statements in batch mode automatically. Statements are then printed from the **Statements [C]** button in the **A/R** view.

Statements having zero charge balance or no new charge activity will not be printed. When using this method, it is not necessary to use the standard Apply Payments function.

1. Select the **Automatic CCOF Payments [D]** button from the **A/R** view.
2. Select the store(s) and billing group used to filter customers.
3. Change the "Post Payment On" date if necessary.
4. Press **Trial Payments [1]** button to preview results prior to processing.
5. Press the **Generate Payments [2]** button to process payment on **CCOF**.
6. Press the **Close [Esc]** button to close this view.
7. Select the **Statements [C]** button to print statements for both **CCOF** and remittance customers.



Apply Adjustments Dialog

Applying Adjustments

This dialog is selected from the **A/R** view **Apply Adjustments [B]** button. Adjustments can be posted anytime to a customer account.

APPLY ADJUSTMENTS DIALOG

1 Adjustment Date

Set the date of the adjustment amount to be posted.

2 Adjustment Reason

Displays buttons with user-defined adjustment reasons. A reason can be either a credit (-) or charge (+) to the account. Adjustments appear on printed statements.

3 Numeric Pad & Display

Used for touch screen amount entry and display of the entered amount.

4 Process Buttons

- **Cancel [Esc]**—Exits function back to **A/R** view.
- **Finish [F12]**—Posts adjustment to the selected customer account.

APPLY ADJUSTMENT PROCESS

1. Using **CL**, select the account customer receiving the adjustment.
2. Enter the adjustment date.
3. Select an adjustment reason button.
4. Enter the adjustment amount.
5. Press the **Finish [F12]** button to post the adjustment.

A/R Reporting

The Reports tab in the **HP** provides an extensive list of **A/R** management reports that include:

- Adjustments
- Invoice Due
- Invoices Paid
- Invoices Posted
- Payments Due
- Payments Posted

Statement Printers

Statements are typically printed from either an Inkjet or Laser printer using single-sheet preprinted forms available from SPOT Business Systems. A perforated payment remittance stub adds convenience for the customer.

LASER PRINTERS

When printing large volumes of statements, it is important to use a printer with a high page-per-minute print speed. Usually, Inkjet printers are much slower than Laser printers, but cost less. For high-volume statement runs, we recommend a Laser printer of a least 20 PPM print speed. At this print speed, approximately 1,200 single page statements can be printed per hour. Printing this many statements each month might require a special high-capacity paper cartridge.

INKJET PRINTERS

Inkjet printers can use large quantities of black ink and are typically slower than Laser printers. If a large number of statements are to be printed each month, be sure to select a printer with a large black ink cartridge reservoir and one designed for continuous commercial use. Home class printers will only survive small statement print runs each month.

*Laser/Inkjet Statement Form—**Open Order Format***

Credit Card Processing

Overview

***CC** at Order Pickup*

***CCOF** for **A/R** and Routes*

*Credit cards as a tender type is fully supported within SPOT and requires the addition of third-party payment processing software. This software simulates the bank terminal typically used by most non-computerized drycleaners, but has the advantage of allowing multiple **CC** transactions to be processed simultaneously. Additional features built into SPOT provide enhanced usability not found in typical bank terminals.*

Overview

Credit card (**CC**) tender transactions require the use of Magnetic Swipe Readers (MSR). Via the MSR attached to each workstation, SPOT interacts with the payment processor via the Internet at the time of sale, initiating a request for an authorization code.

CC COMMUNICATION MODES

SPOT has been specially designed to support communications with the payment processing network:

- **Internet**—This method provides almost instantaneous **CC** authorizations, in the order of 2-4 seconds per **CC** transaction. It requires a persistent Internet connection (such as DSL, cable modem, etc.) and the use of the SPOT Business Systems recommended payment processor, Payment Processing Inc (PPI). Not all payment processors offer this service, so SPOT Business Systems had to standardize to a single provider.

CC ON FILE (CCOF)

The **CCOF** feature allows a credit card to be swiped and memorized within a customer account. SPOT allows a high degree of automation by coupling **CCOF** and **CC** payment features to:

- Pay for normal order pickups or prepayments without the need to swipe the **CC** at each order pickup transaction.
- Automate route payment drafting for all delivered orders.
- Automatically pay accounts receivable statements in full each month.

When **CC** information is retained by SPOT in this manner for a customer, swiping the **CC** for each subsequent transaction is unnecessary. Declined or expired **CC**s appear on a SPOT denial report and the card is automatically deactivated for subsequent charges until reactivated under password controlled access. **CC** numbers saved in SPOT are encrypted with only the last four digits exposed in human readable form for security purposes.

PRINTED CC FORMS

SPOT automatically prints all necessary forms in support of **CC** payment processing.

Customer and Register Receipts

SPOT prints all necessary credit card receipts on the same thermal printer used to print most other system forms, one for the customer and a register copy with a signature line for store records. For security purposes, SPOT only prints the last 4 digits of the customer's credit card on receipts. Both print automatically upon payment completion. Note that printed **CC** receipts intentionally use internal printer fonts for the fastest possible print speed, resulting in a plain look.

CCOF Authorization Form

As part of the Federal Consumer Protection Act, adopted differently by each State, you might be required to have **CCOF** customers sign a form authorizing continuing use of their **CC** for a particular purpose. SPOT can print an authorization form for convenience (content is user-definable) or have one preprinted for this purpose. It is your responsibility to conform to local regulations and any required authorization wording.

CC REPORTING

SPOT is capable of printing a variety of reports to help manage **CC** payments and for bank statement reconciliation.

CC at Order Pickup

The following rules apply to **CC** use at the time of order pickup.

- **CC Transactions**—If no **CCOF** exists, pressing the **Credit Card** tender button prompts to swipe the **CC** and for payment transaction based on the defined mode of operation. Press the **Clear Payments** button to select an alternate tender type. Multiple tender types can be selected (including **CC**) if desired.
- **CCOF Transactions**—If **CCOF** exists for the selected customer, the default tender type is always the on-file card. In this case, the **CC** tender button shows the card type and last four digits of the card number for verification in the form "Visa 1234." The total amount due is displayed in the **CC** tender field waiting for order completion with the press of the **CC** tender button. Press the **Clear Payments** button to select an alternate tender type or to swipe a different card.

Receipt - Customer Copy

Thursday Sep 19, 2002 11:32 AM

My Dry Cleaner
12346 South 300 East
Draper, UT 84020
(801) 495-1202

Customer, Test
Phone # (801) 555-1235

Invoice#	Price
09-000003	$8.54
Total Due:	$8.54
Amount Tendered:	$8.54 Credit Card
Change:	$0.00

Credit Card Information:

Name:Customer, Test
Number:**********
Auth #:

Amount: $8.54 Sale

Thank You!

*CC Receipt—**Customer Copy***

Receipt - Register Copy

Thursday Sep 19, 2002 11:32 AM

My Dry Cleaner
12346 South 300 East
Draper, UT 84020
(801) 495-1202

Customer, Test
Phone # (801) 555-1235

Invoice#	Price
09-000003	$8.54
Total Due:	$8.54
Amount Tendered:	$8.54 Credit Card
Change:	$0.00

Credit Card Information:

Name:Customer, Test
Number:**********
Auth #:

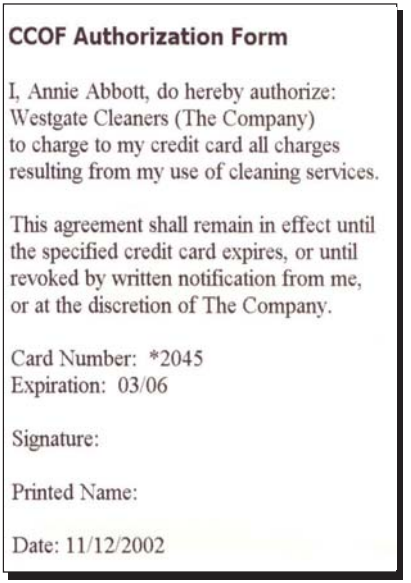
Amount: $8.54 Sale

Signed:_____

I agree to pay the above total amount according to the Card Issuer Agreement.

Thank You!

*CC Receipt—**Register Copy***



CCOF Authorization Form

I, Annie Abbott, do hereby authorize:
Westgate Cleaners (The Company)
to charge to my credit card all charges resulting from my use of cleaning services.

This agreement shall remain in effect until the specified credit card expires, or until revoked by written notification from me, or at the discretion of The Company.

Card Number: *2045
Expiration: 03/06

Signature:

Printed Name:

Date: 11/12/2002

CCOF Authorization Form

- **Declined Transactions**—If a **CC** or **CCOF** transaction is declined, the transaction can automatically post to an **A/R** account if configured to do so in the **CV A/R - CC** tab (*Precedence* setting). If not so configured, declined **CC** transactions can be handled via the **Payment Exceptions** button of the **Menu [F3]** function. As an alternative, the system can prompt for an alternate **CC** swipe.

CCOF for A/R and Routes

SPOT supports payment of **A/R** by **CCOF** as an alternative to a mailed check. Delivered route orders can be drafted by **CCOF** at the end of each delivery cycle or posted to **A/R** and paying **A/R** by **CCOF**. The latter method minimizes **CC** transaction fees, paying the statement once a month only. See the **A/R** and Route sections in this guide for detailed descriptions of **CC** use.

CCOF Batch Payment Exceptions

SPOT forces **CC** payment exceptions to be dealt with during the order Pickup process (orders can't be picked up unless paid for). **CCOF** batch processes (such as **CCOF** payments for route deliveries or monthly statement payment) can experience exceptions during automatic payment processing. A special mechanism is available to resolve such exceptions. The **Menu [F3]** contains a function called *Payment Exceptions* used to resolve **CCOF** order charges that have not received approval codes. There are two typical situations where this occurs:

- **Declined**—When a **CCOF** charge is submitted but declined by the payment processor, it is returned with a *declined* status. This is normally caused by an over-limit charge amount, expired card, or communications failure.
- **Submitted**—When **CCOF** batch charges are submitted with no confirmation response returned by the payment processor or bank, charge status for the batch remains as *Submitted* and must be resolved. This is sometimes caused by communications failure.

PAYMENT EXCEPTIONS VIEW

The *Payment Exceptions* view list contains information about each attempted **CCOF** payment that resulted in an exception. Of particular interest are the two columns:

- **Action**—The selected action used to resolve the exception.
- **Status**—The status of the exception.

Action Buttons

Use these buttons to select the resolution action. The action selection is noted in the *Action* column for each customer charge.

- **Re-Submit**—Prepares the selected charges to be re-submitted.
- **Close Order**—Prepares to mark the selected charges as paid if an order with a *Submitted* status is found to be paid.
- **Write Off**—Prepares to mark affected orders as picked up, effectively closing the orders without collecting money. Similar to a void.

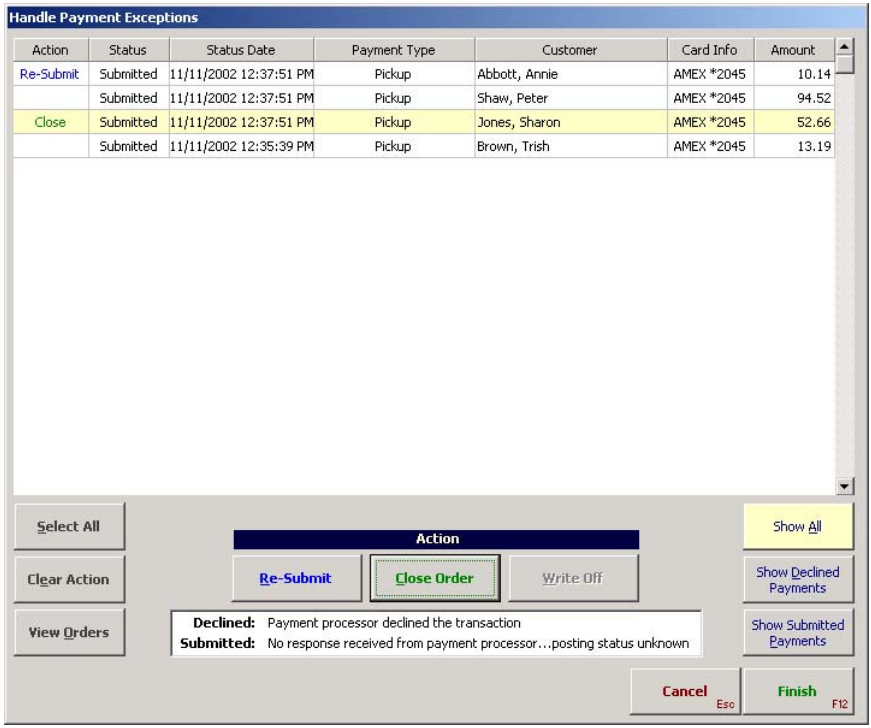
Selection Buttons

- **Select All**—Selects all orders in the list (highlighted in yellow).
- **Clear Action**—Resets selected charge entries to no action.
- **View Orders**—Displays the Search view populated with all affected orders for the selected charges.
- **Show All**—Displays *Declined* and *Submitted* exceptions (default).
- **Show Declined Payments**—Displays only *Declined* payments.
- **Show Submitted Payments**—Displays only *Submitted* payments.
- **Finish [F12]**—Applies selected actions and exits.

RESOLVING DECLINED EXCEPTIONS

Use the following steps to resolve *Declined* charges. NOTE: Due to the variety of payment processors with unique exception messages, SPOT is unable to resolve specific reasons for declined charges.

1. Check **CI A/R - CC** tab to see if declined cards have expired.
2. Contact customers for new expiration date or **CC** number.
3. Change the *Action* field on all declined charges to *Re-Submit*.
4. Press the *Finish [F12]* button.



Payment Exceptions View

RESOLVING SUBMITTED EXCEPTIONS

These exceptions are typically difficult to deal with since it is unknown if the payment processor or bank has processed the transmitted batch transactions. Fortunately, these problems do not occur frequently. If the batch has been processed and no acknowledgment received, re-submitting the batch will likely result in duplicate charges for the same orders.

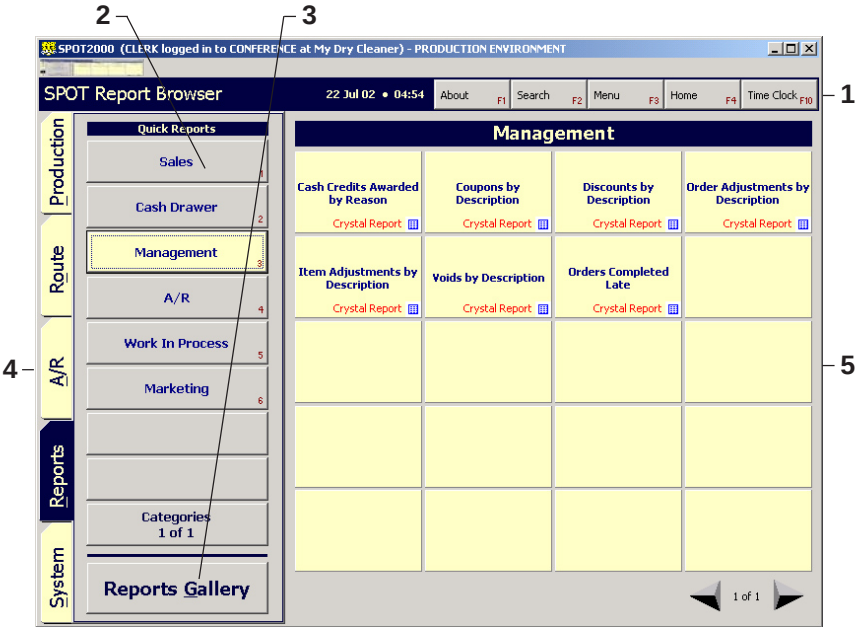
In most instances, the payment processing software used with SPOT (ICVerify or PCCharge) will have knowledge of the status of the batch in question. Contact technical support for help accessing payment processing software batch status reporting. It may be necessary to contact the payment processor to determine batch status.

1. If the batch has not been processed, use *Re-Submit* action button.
2. If the batch has been processed, use *Close Order* action button.

Management Reporting

Quick Report View
Reports Gallery
Report Features
Available Reports

The management reporting function is accessed via the **HP Reports** *tab. SPOT contains a wide variety of reports providing an effective management tool. In addition, an optional report writer is available allowing creation of new reports and customizing of existing reports. All reports are displayed to the screen and optionally printed. Selected sample reports are shown on the following pages.*



Quick Reports View

Quick Report View

This view is accessed by selecting the **Reports** tab from **HP**. This sleek user interface allows the user to create a list of major report categories (in any order), then define the list of actual report buttons that appear for selection (in any order).

Once a report is selected, it is displayed in an on-screen view with printing optional. When assigning a report to a report group during configuration, the list of all reports is presented allowing any report to be assigned to any category, completely at the users discretion. A list has been configured for immediate use, but can be modified as needed.

The normal purpose of this view is for touch screen accessibility to an abbreviated list of reports needed only by managers or clerks. The expanded list of reports is found in the Reports Gallery.

REPORT VIEW

1 Function Buttons

Search [F2]—Order search function.
Menu [F3]—Lesser used functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

2 Quick Report Group Buttons

Each user-definable report group is represented by a button in this column. Individual reports appear as buttons on the right. Each report button contains a description of the report as well as the type of reporting function. The list sequence of reports assigned to a report group button can be easily changed.

3 Reports Gallery Button

Provides access to the management-level reporting function (described in more detail below).

4 Operation Tabs

Production—Order processing functions.
Route—Route utility.
A/R—Accounts Receivable utility.
Reports—Management reporting.
System—System utilities.

5 Quick Report Buttons

These buttons are user-definable and are typically used for clerk access by touch screen. This collection of buttons is assigned to a Quick Report Group button (to the left). Pressing the arrow buttons in the lower right selects a list of additional report buttons if available.

REPORT SPECIFICS

All reports function in the same manner.

1. Report selection.
2. Report display to monitor.
3. Optionally print report.

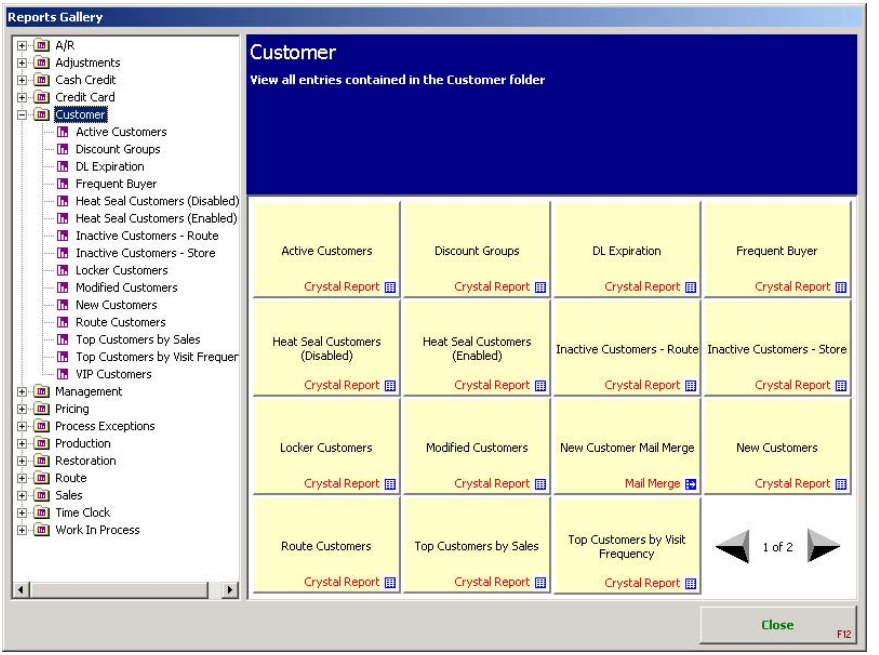
Report View

The top portion of each displayed report contains standard Windows controls. All reports are displayed to the screen first, then optionally printed.

- View scaling by percentage.
- Scrolling controls for viewing multiple pages.
- Print button.

Summary Totals

Summarization of vital report data contents is available on most reports.



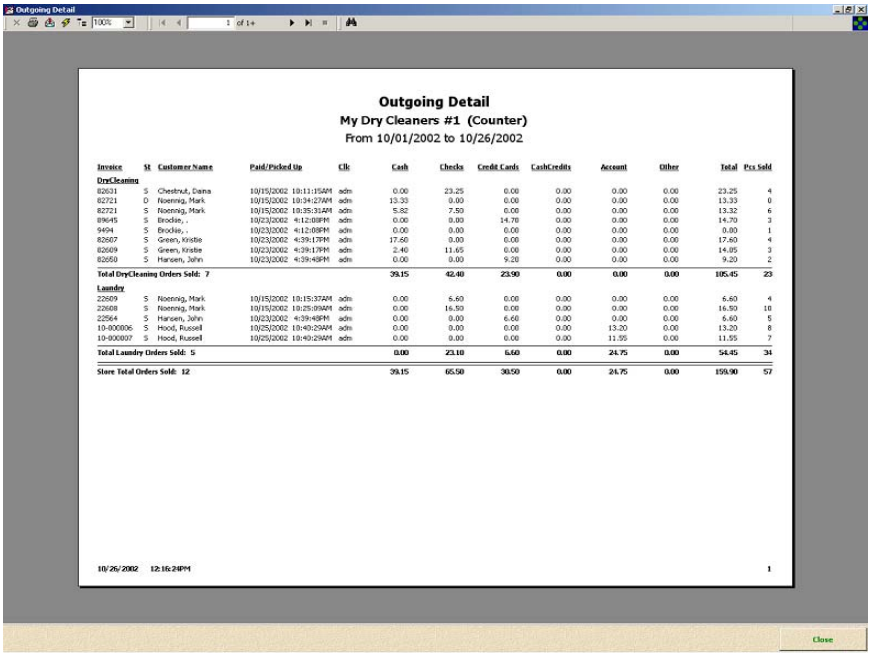
Reports Gallery

Reports Gallery

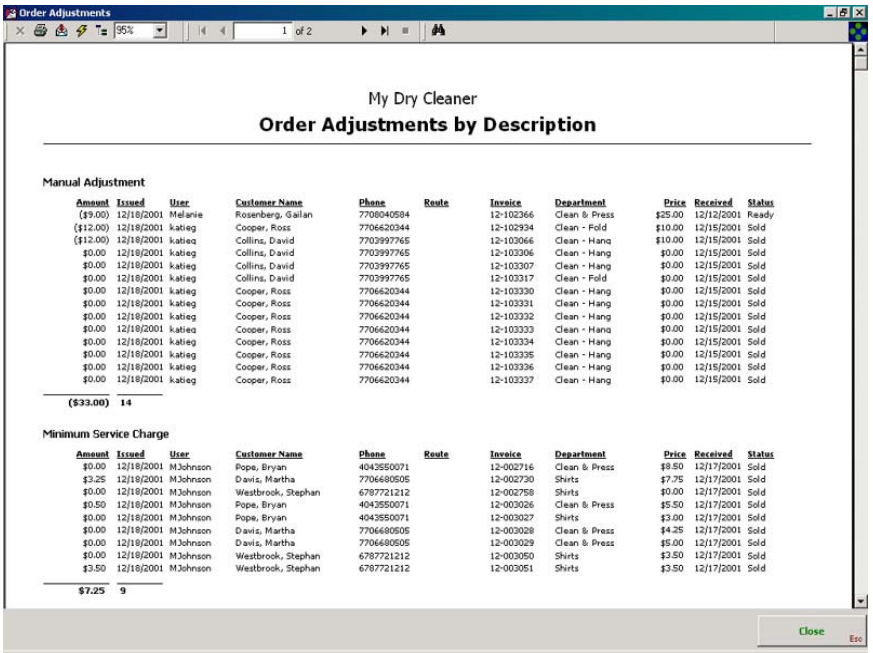
Designed for management use, the Reports Gallery contains the list of all available reports in a tree view along with expanded report functions for back office use. Clicking on the "+" box expands the tree to include individual reports for the selected group. Clicking on the "-" box collapses the tree for the selected group. Above the group of report buttons is a description of the reporting group as selected in the left tree-view. Each button contains a description of the report as well as the type of reporting function:

- Standard Crystal Report
- Post Card
- Mail Merge
- Email

A report could be defined that could be emailed to a particular location, or an A/R dunning letter could be sent via the Mail Merge or Post Card function. Multiple report pages are selectable by pressing the arrow buttons in the lower right-hand corner.



Sample Outgoing Detail Report



Sample Order Adjustment Report

Report Features

DISPLAY CONTROLS

All reports display to the screen and are optionally printed. The top of the report display contains report viewing controls allowing sizing and scrolling the report.

CONSOLIDATED REPORTING

Sales and **A/R** reports can be run for a single store or across all stores in a centralized SPOT system. A filter dialog automatically prompts for the store number when running appropriate reports.

MAIL MERGE

The export of address specific customer data into Microsoft Word is possible using the optional report writer or one of the merge reports included in the customer report group.

REPORT WRITER

Most existing reports can be modified using SPOT's internal report writer (called SPOT Query) along with the optionally purchased Crystal Reports 8.5 or greater.

BALANCING INVENTORY TO SALES

An advanced feature of SPOT is the ability to balance the change in physical inventory value to the change in sales value. For example, as orders are sold the physical inventory value decreases and sales value increases resulting in a net daily balance that can be used for theft loss identification. The physical inventory process provides a way to verify beginning inventory value. The Sales report group contains incoming and outgoing reports used to verify order value changes against. See *A Typical Operational Day* chapter for more details on the balancing process.

Available Reports

Most of the reports listed below are supported by the built-in report writer (requires the purchase of an optional Crystal Reports library) for modification. Filters within each selected report type further extend the flexibility and variety of the reporting function. Various filter views appear when needed with each report type selection and include these basic types:

- Date Range
- Store
- Route/Counter

More than 200 total reports are available, each designed to fill a particular need. The following is a list of all available reports. (*NOTE: New reports and report categories are addded to SPOT with future releases on a regular basis, so this list may not reflect the actual list on your SPOT version.*)

A/R

- Adjustments
- Credit Limits
- Customers
- Disabled
- Invoice Due
- Invoices Paid
- Invoices Posted
- Payments Due
- Payments Posted
- Total Due

Adjustments

- Coupons by Customer
- Coupons by Date
- Coupons by Description
- Coupons by User
- Discounts by Customer
- Discounts by Date
- Discounts by Description
- Discounts by User
- Item Adjustments by Customer
- Item Adjustments by Date
- Item Adjustments by Description
- Item Adjustments by User
- Order Adjustments by Customer
- Order Adjustments by Date
- Order Adjustments by Description
- Order Adjustments by User
- Voids by Customer
- Voids by Date
- Voids by Description
- Voids by User

Cash Credits

- Activity
- Awarded by Reason
- Awarded from Frequent Buyer
- Customers
- Used by Date

Credit Card

- CCOF Customers
- CCOF Disabled
- CCOF Expiration
- Transactions

Customer

- Active Customer
- Discount Groups
- Drivers License Expiration
- Frequent Buyer
- Heat Seal Customers Disabled
- Heat Seal Customers Enabled
- Inactive Customers
- Locker Customers
- Modified Customers
- New Customer
- New Customer Mail Merge
- Route Customers
- Top Customers by Sales
- Top Customers by Visit Frequency
- VIP Customers
- VIP Customers Mail Merge

Management

- Cash Drawer Summary
- Cashout Summary by Date
- Cashout Summary by Drawer
- Checks Received by Date
- Employees
- Payins
- Payouts
- Route Report for Commissions
- Transaction Detail by Date
- Transaction Detail by Drawer
- Workstations

Pricing

- GL Chart of Accounts
- Merchandise Items
- Modifier Lists
- Price Table

Process Exceptions

- Orders Competed Late
- Orders with Redos
- Racking Exceptions

Production

- Detailed Orders by Date
- Detailed Orders by Clerk by Hour
- Dropoffs by Hour
- Dropoffs by Item
- Item Counts by Clerk
- Order Aging
- Orders for Discounted Customers
- Pickup Detail
- Pickups by Department
- Pickups by Department - Hourly
- Pickups by Department - Non Taxable
- Pickups by Item
- Production by Clerk
- Racked Orders by Date
- Sold Orders by Date

Restoration

- Billing Manifest (Detail)
- Billing Manifest (Summary)
- Contractor Manifest (Detail)
- Contractor Manifest (Summary)
- Customer Manifest (Detail)
- Customer Manifest (Summary)
- Insurance Manifest (Detail)
- Insurance Manifest (Summary)

Route

- Driver Commission
- Route Customers

Sales

- Incoming Detail
- Incoming Summary
- Outgoing Detail
- Outgoing Summary

Time Clock

- Detail
- Summary

Work In Process

- Current Orders
- Inventory Report - All Orders
- Inventory Report - In Process
- Inventory Report - Ready
- Orders with Alterations
- Orders with Unresolved Price Later Items

Operational Utilities

System Utilities Tab

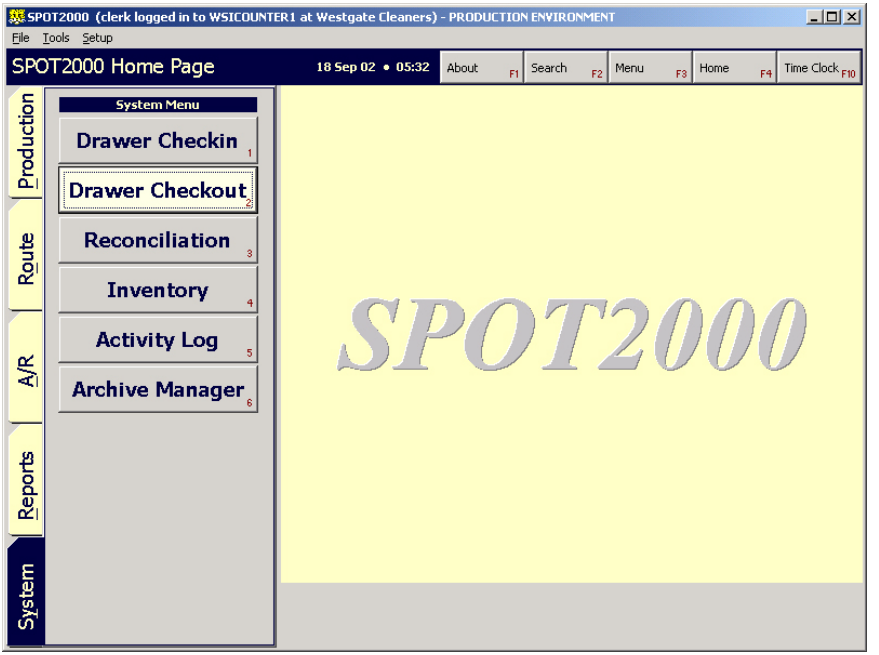
Drawer Check In/Out

Physical Inventory

Time Clock

Activity Log

System utilities are accessed via the **HP** System *tab and Function buttons. SPOT provides a variety of utilities to greatly improve user efficiency and dramatically enhance loss control.*



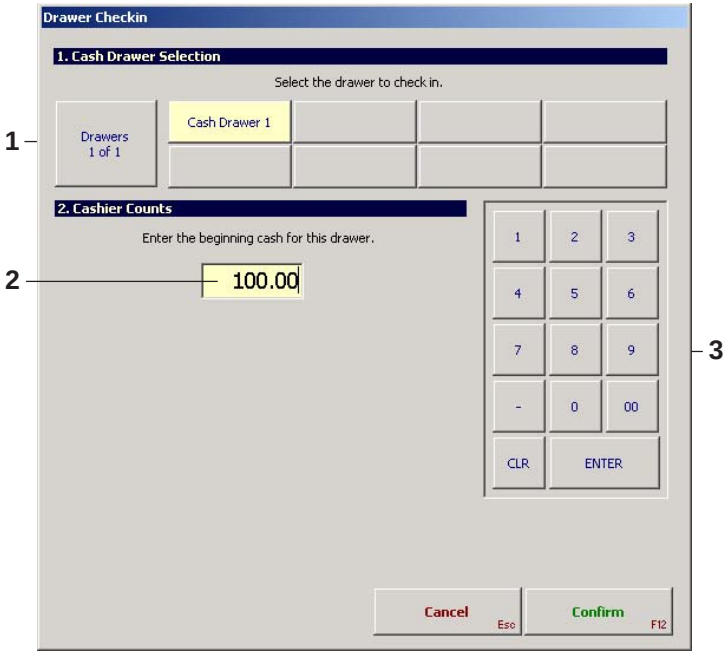
*Home Page—**System Tab View***

System Utilities Tab

The **HP** System tab contains access buttons for several utilities. All utilities, except the *Archive Manager*, are discussed in this section. The Archive Manager is discussed in a separate chapter.

Drawer Check In/Out

Access to these two functions is via the **HP** System tab. They are used together to help enhance cash control by providing cash drawer balancing utilities. Two modes exist under configuration control. The first mode allows all clerks to have access to active cash drawers. When a cash drawer becomes active, it is active for all clerks. The second mode grants drawer access only to the clerk selecting it during Checkin. Up to two drawers can be attached to each active workstation in the network.



Cash Drawer Checkin View

CHECKIN VIEW

This beginning of the day or shift function is used to assign a physical cash drawer to a clerk and allow that clerk to enter the beginning balance for the drawer (optional). Without completing this step, a clerk will not have access to any order processing functions involving cash transactions through the drawer.

1 Drawer Selection

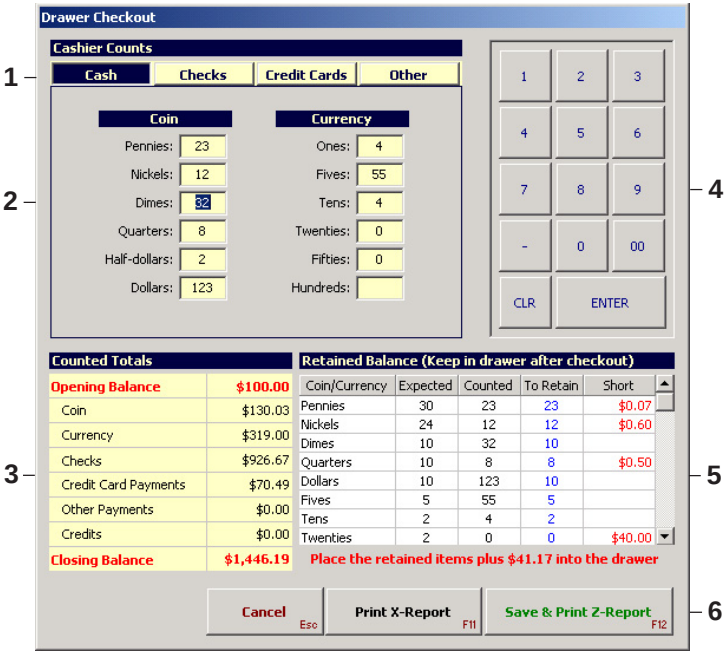
Under configuration, cash drawers are named (i.e., *Cash Drawer 1*, *Cash Drawer 2*, *Counter 1*, *Counter 2*, etc). These names appear on buttons for selection. Once selected, the drawer is active for use until released by the *Checkout* process. Press the **Drawers (1 of X)** button for additional choices (other groups exist if X is greater than 1).

2 Opening Balance

Enter the beginning amount actually counted for the selected drawer. This amount appears as the *Opening Balance* in *Checkout* function.

3 Numeric Pad

Used to enter the opening amount as an alternative to the keyboard.



Cash Drawer Checkout View

CHECKOUT VIEW

At the end of an employee shift or close of the business day, this view provides a blind coin count reconciliation of a cash drawer. **PIN** access to this view selects the drawer assigned to the clerk.

1 Cashier Counts Tabs

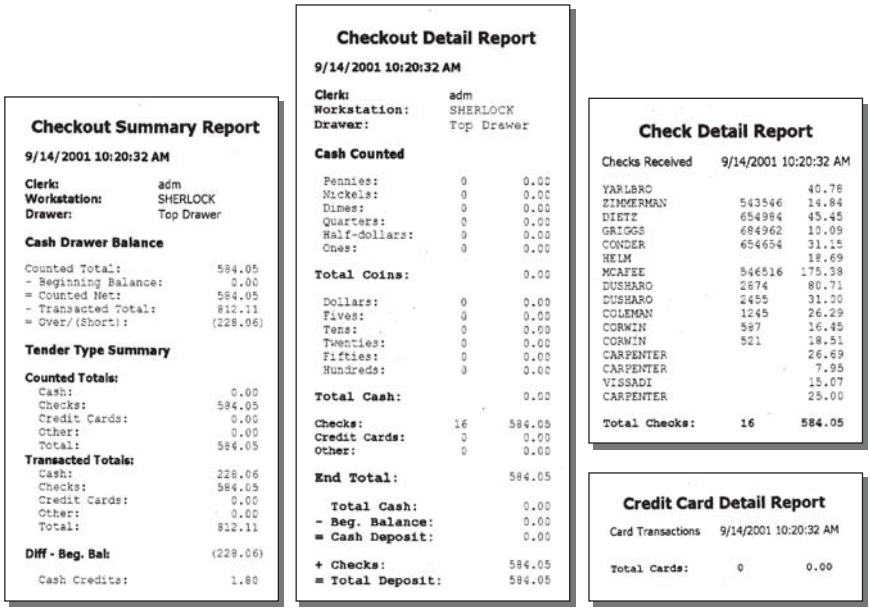
Selects the tender type reconciliation view for Cash (default), Checks, **CC**s, and Other. The default Cash tab is unique allowing for piece count entry. Checks, **CC**, and Other tabs are list views designed to verify the presence of each item with checkmarks and showing line item details.

2 Cash Piece Count Entry

Blind drawer reconciliation is accomplished by counting cash denomination pieces only. Entering coin and currency piece counts in each respective field allows the system to calculate the totals for each automatically, eliminating adding mistakes when counting by amount.

3 Counted Totals

As each tender type is entered in the Cashier Counts area, the system calculates amounts, entering each into the appropriate tender total field. Also displayed here is the *Opening Balance* as entered during Checkin for this drawer as well as the *Closing Balance*.



Checkout Summary Report

9/14/2001 10:20:32 AM

Clerk: adm
Workstation: SHERLOCK
Drawer: Top Drawer

Cash Drawer Balance

Counted Total:	584.05
- Beginning Balance:	0.00
= Counted Net:	584.05
- Transacted Total:	812.11
= Over/(Short):	(228.06)

Tender Type Summary

Counted Totals:	
Cash:	0.00
Checks:	584.05
Credit Cards:	0.00
Other:	0.00
Total:	584.05
Transacted Totals:	
Cash:	228.06
Checks:	584.05
Credit Cards:	0.00
Other:	0.00
Total:	812.11
Diff - Beg. Bal:	(228.06)
Cash Credits:	1.80

Checkout Detail Report

9/14/2001 10:20:32 AM

Clerk: adm
Workstation: SHERLOCK
Drawer: Top Drawer

Cash Counted

Pennies:	0	0.00
Nickels:	0	0.00
Dimes:	0	0.00
Quarters:	0	0.00
Half-dollars:	0	0.00
Ones:	0	0.00
Total Coins:		0.00
Dollars:	0	0.00
Fives:	0	0.00
Tens:	0	0.00
Twenties:	0	0.00
Fifties:	0	0.00
Hundreds:	0	0.00
Total Cash:		0.00
Checks:	16	584.05
Credit Cards:	0	0.00
Other:	0	0.00
End Total:		584.05
Total Cash:		0.00
- Beg. Balance:		0.00
= Cash Deposit:		0.00
+ Checks:		584.05
= Total Deposit:		584.05

Check Detail Report

Checks Received 9/14/2001 10:20:32 AM

YARLBRO		40.78
ZIMMERMAN	543546	14.84
DIETZ	654984	45.45
GRIGGS	684962	10.09
CONDER	654654	31.15
HELM		18.69
MCAFEE	546516	175.38
DUSHARO	2674	80.71
DUSHARO	2455	31.00
COLEMAN	1245	26.29
CORWIN	587	16.45
CORWIN	521	18.51
CARPENTER		26.69
CARPENTER		7.95
VISSADI		15.07
CARPENTER		25.00
Total Checks:	**16**	**584.05**

Credit Card Detail Report

Card Transactions 9/14/2001 10:20:32 AM

Total Cards:	0	0.00

*Checkout Reconciliation Summary—**Counter Thermal Printer***

4 Numeric Pad

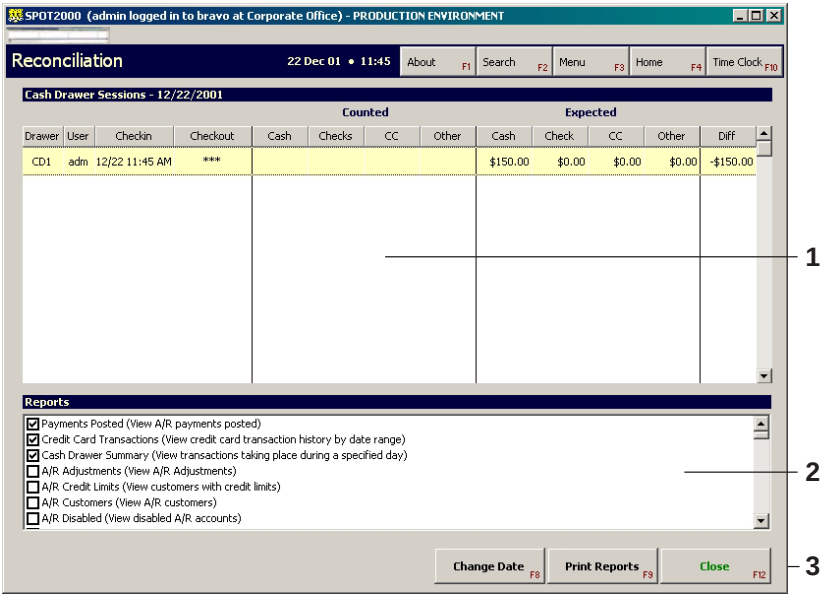
Used to enter piece counts as an alternative to the keyboard.

5 Retained Balance Totals

A configuration option provides a setting to set the number of coins for each denomination to be retained in the cash drawer at the end of the drawer reconciliation process. The retained coin amounts are compared to the actual counted coin totals with a shortage appearing in the *Short* column. Amounts in this column indicate a shortage of needed coins and must be added back into the drawer from an outside source.

6 Process Buttons

- **Cancel [Esc]**—Exits Checkout function back to **HP** view.
- **Print X Report**—Prints a trial cash drawer settlement prior to checkout without zeroing drawer totals. For added security, this button can be deactivated under configuration control.
- **Save and Print Z Report [F12]**—Finalizes the drawer checkout process by posting final balance results. This function also releases the cash drawer for the next clerk and prints the checkout summary, usually through the counter thermal printer.



Reconciliation View

RECONCILIATION VIEW

This view lists the current status of all active and closed cash drawer sessions in real-time for the specified day only.

1 Drawer Sessions List

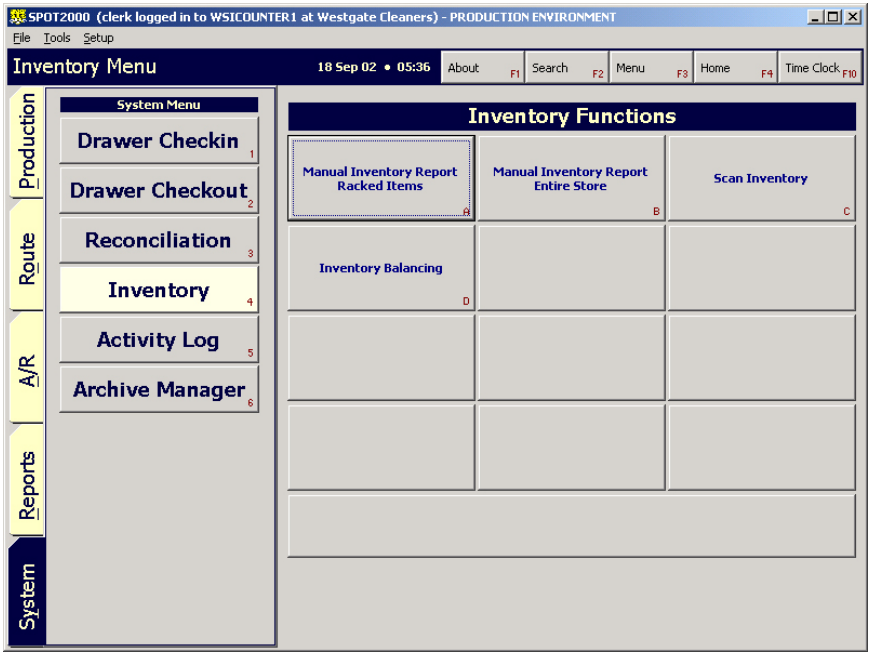
Shows drawer activity summary. Drawers in current use display Expected totals only (transacted totals), while reconciled drawers display *Counted*, *Expected*, and *Diff* (the difference between counted and expected) totals.

2 Reports List

Displays the list of available reports. Checkmarks select any report or series of reports to be included in the printed reconciliation group.

3 Process Buttons

- **Change Date [F8]**—Prints a trial cash drawer settlement prior to checkout without zeroing drawer totals.
- **Print Reports Button [F9]**—All reports checkmarked in the Reports list will print automatically, one after the other.
- **Close [F12]**—Exits back to **HP** view.



Physical Inventory Type Selection View

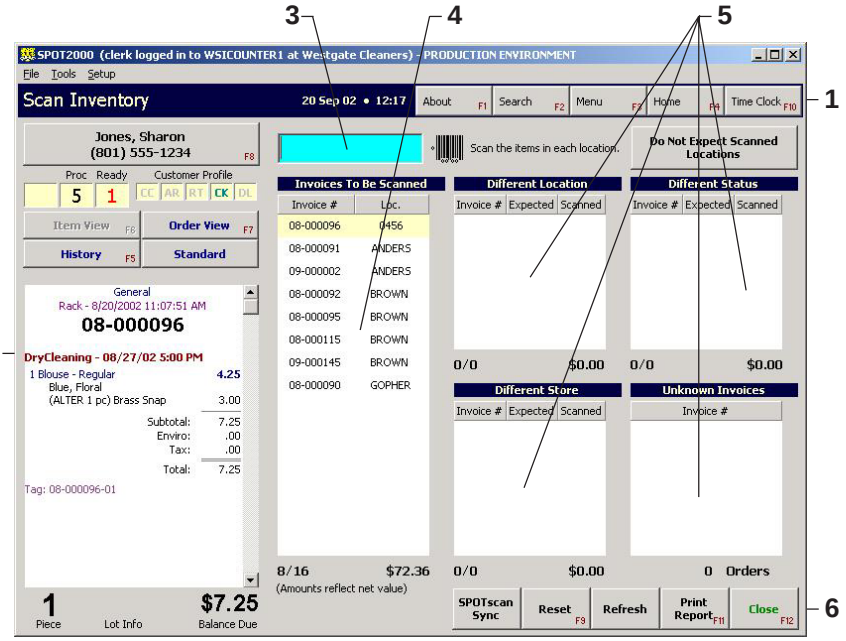
Physical Inventory

The physical inventory function is accessed via the **HP System** tab. A physical inventory can be conducted using two different methods; a printed report sorted by rack location, or by scanning barcodes on invoices. Each method has it advantages and disadvantages in terms of speed and accountability. Both methods can verify order existence at the proper rack location.

INVENTORY BY REPORT

Select this function via the **Manual Inventory Racked Items [A]** (completed orders only) or **Manual Inventory Entire Store [B]** (completed orders + orders in process) buttons in the **HP System** tab. A report is generated sorted by rack location number with physical inventory proceeding as follows:

1. Checkmark all orders found as expected
2. Orders not found as expected remain for verification



Physical Inventory Utility View

INVENTORY BY BARCODE

Select this function via the **Scan Inventory [C]** button in the **HP System** tab. Upon entry to this view, an inventory cutoff date dialog appears. A snapshot of the status of all in-process orders known to the computer as of this cutoff date is then memorized as the comparison list to scanned physical orders. Memorized orders are displayed in the "Invoices To be Scanned" list. Scanned orders found in inventory as expected are simply removed from the list. Scanned exception orders are moved to an appropriate exception list. A perfect physical inventory with no exceptions results in all lists showing no entries. This utility can be exited and reentered without losing prior scans, but only if the current scans have not been cleared using the **Reset** button or automatic dialog prompt.

Under configuration, this inventory method can be active for completed and racked orders only (*Ready* status) or all orders in process. Exception lists contain summary totals of *Order/Piece* counts and *Value*. Also under configuration, values can be based on either Gross (total amount for all invoices) or Net (amount due for all invoices).

1 Function Buttons

Search [F2]—Order search function.
Menu [F3]—Lesser used functions.
Home [F4]—Return to **HP.**
Time Clock [F10]—Employee clock-in/out.

2 Visual Invoice

Displays the contents of each invoice as scanned. Selecting an order in any of the five lists also displays the contents of the selected invoice.

3 Scanned Invoice Display

Scanned order numbers are displayed here.

- **Do Not Expect Scanned Locations Button**—Physical inventories can include or exclude rack location verification. Press this button to switch between each choice. Location verification requires barcoded rack labels (available from SPOT Business Systems).

4 Invoices to be Scanned List

Displays the list of racked orders (*Ready* status only), based on the selected inventory cutoff date. Clicking on any order displays that order in the **VI**. Scanned orders found as expected are removed from the list. Scanned exception orders are moved from this list to the a specific exception list based on exception type. Blind inventories can be run by changing a configuration option to disable this list from appearing.

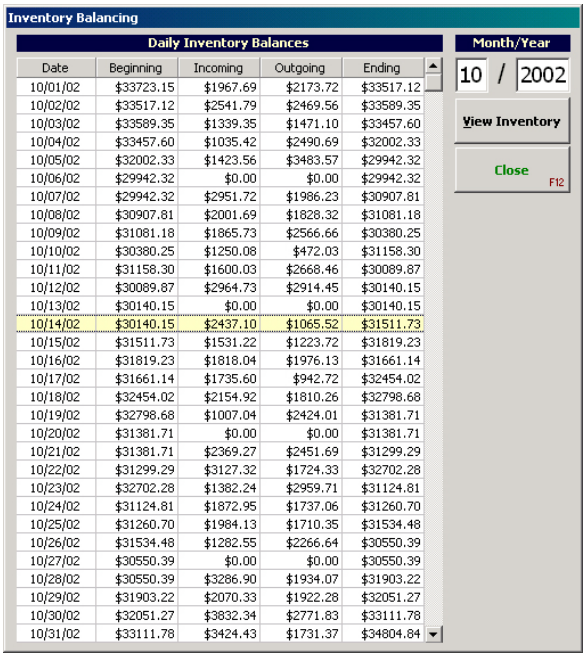
5 Exception Lists

Displays scanned orders by exception type.

- **Different Location**—Scanned orders have a different rack location than that recorded in the system.
- **Different Status**—Scanned orders have a different order status than *Ready*. An order with a *Sold* status would show up here.
- **Different Store**—Scanned orders should be at a different store location. Items appear in the list only in centralized systems with multiple store locations.
- **Unknown Invoices**—Scanned orders are not found in the system.

6 Process Buttons

- **SPOTScan Sync Button**—Transfers data from the SPOTscan portable cordless digital scanner running in *Inventory* mode.
- **Reset [F9]**—Readies system for a new physical inventory session.
- **Print Report [F11]**—Prints the results of a physical inventory.
- **Close [F12]**—Exits and returns back to the **HP** view. Note that until the **Reset [F9]** button is pressed, reentry back into this function is always allowed without losing prior scanned input.



Date	Beginning	Incoming	Outgoing	Ending
10/01/02	$33723.15	$1967.69	$2173.72	$33517.12
10/02/02	$33517.12	$2541.79	$2469.56	$33589.35
10/03/02	$33589.35	$1339.35	$1471.10	$33457.60
10/04/02	$33457.60	$1035.42	$2490.69	$32002.33
10/05/02	$32002.33	$1423.56	$3483.57	$29942.32
10/06/02	$29942.32	$0.00	$0.00	$29942.32
10/07/02	$29942.32	$2951.72	$1986.23	$30907.81
10/08/02	$30907.81	$2001.69	$1828.32	$31081.18
10/09/02	$31081.18	$1865.73	$2566.66	$30380.25
10/10/02	$30380.25	$1250.08	$472.03	$31158.30
10/11/02	$31158.30	$1600.03	$2668.46	$30089.87
10/12/02	$30089.87	$2964.73	$2914.45	$30140.15
10/13/02	$30140.15	$0.00	$0.00	$30140.15
10/14/02	$30140.15	$2437.10	$1065.52	$31511.73
10/15/02	$31511.73	$1531.22	$1223.72	$31819.23
10/16/02	$31819.23	$1818.04	$1976.13	$31661.14
10/17/02	$31661.14	$1735.60	$942.72	$32454.02
10/18/02	$32454.02	$2154.92	$1810.26	$32798.68
10/19/02	$32798.68	$1007.04	$2424.01	$31381.71
10/20/02	$31381.71	$0.00	$0.00	$31381.71
10/21/02	$31381.71	$2369.27	$2451.69	$31299.29
10/22/02	$31299.29	$3127.32	$1724.33	$32702.28
10/23/02	$32702.28	$1382.24	$2959.71	$31124.81
10/24/02	$31124.81	$1872.95	$1737.06	$31260.70
10/25/02	$31260.70	$1984.13	$1710.35	$31534.48
10/26/02	$31534.48	$1282.55	$2266.64	$30550.39
10/27/02	$30550.39	$0.00	$0.00	$30550.39
10/28/02	$30550.39	$3286.90	$1934.07	$31903.22
10/29/02	$31903.22	$2070.33	$1922.28	$32051.27
10/30/02	$32051.27	$3832.34	$2771.83	$33111.78
10/31/02	$33111.78	$3424.43	$1731.37	$34804.84

Inventory Balancing View

INVENTORY BALANCING

This utility compares the production value of orders from the beginning of a production day to the end of the same day. Orders dropped off are added to the total value, while orders picked up are subtracted from total value of the specified day. The values contained in this view are calculated automatically based on actual SPOT order production as determined by user interaction with order processing steps.

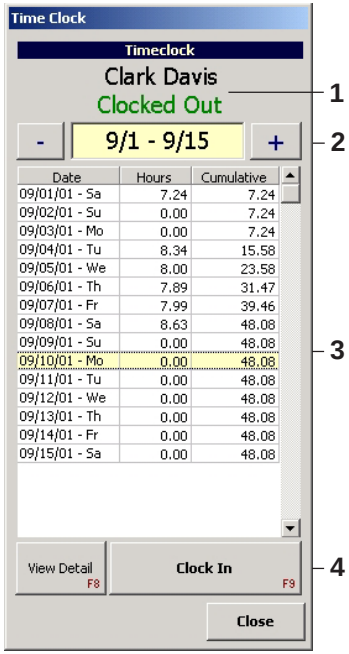
Balancing against actual physical inventory is accomplished using the **Scan Inventory** function, conducting the physical inventory, then comparing the value of all scanned inventory from the printed scanned inventory report to the *Ending* value for the selected day. Note that the physical inventory system must be configured to the *Net* value in order for amounts to balance.

Month/Year Field

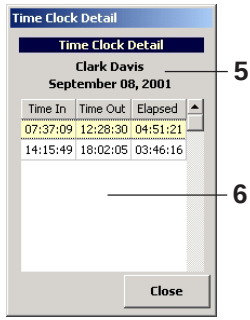
Enter the month and year in the *Daily Inventory Balances* list. Inventory balancing information is always displayed by full months.

View Inventory Button

Press this button to display totals for a newly entered *Month/Year*.



Time Clock Dialog



Time Clock Detail

Time Clock

The time clock is accessed via the **Time Clock [F10]** function button and is always active, so clerks can clock in/out from any workstation at any time. Clock in/out confirmation ensures positive action, while a configuration option allows employee receipt printing. Use is straight forward.

1 Press **Time Clock [F10]** button.
2 Enter clerk **PIN.**
3 Press **Clock In/Out [F9]** Button.

TIME CLOCK VIEW

1 Name and Status

Displays the name of the clerk and current clock in/out status.

2 Pay Period

The +/- buttons allow display of other than the current pay period. Time clock entries are view-only and can't be changed. Only authorized users can edit time clock entries using the **Menu [F3]** button. Pay periods must be configured prior to use.

3 Pay Period Entries
Each day in the selected period shows total and accumulated hours worked.

4 Action Buttons
- **View Detail [F8] Button**—Displays the Time Clock Detail dialog for the selected day from the Time Clock view.
- **Clock In/Out [F9] Button**—Performs a clock-in or clock-out function, depending on prior status. Note that this button changes from *Clock In* to *Clock Out* to indicate the pending action.

TIME CLOCK DETAIL VIEW

5 Name and Selected Date
Displays the name of the clerk and the selected date.

6 Daily Entries
Displays clock-in/out events and elapsed time between events.

Activity Log

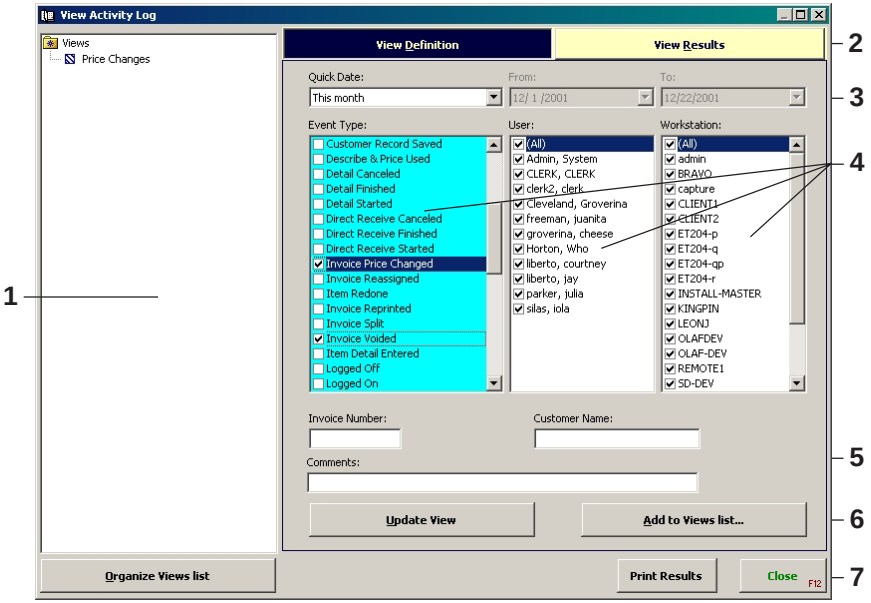
The Activity Log is accessed via the **HP System** tab or **Menu [F2]**. Clerk chronological activity provides instant review of past system use. Filters can be activated to drill-down on transaction specifics such as *Voids* or *Zero Price Overrides* over a specified date range. Commonly used filter selections can be memorized for quick recall.

The ability to review clerk activity provides a revealing look into suspicious employee actions, often leading to theft loss detection. Clerk tracking requires **PIN** entry. The process is straight forward.

1. Define the filter selection criteria from the **View Definition** tab
2. Review the results from the **View Results** tab

VIEW DEFINITION TAB
This tab allows results criteria to be established. For example, selecting a clerk, date range, and all voided Items could be defined to track suspicious voids performed by a specific clerk.

1 Memorized Activities Tree
Memorized activities can be uniquely named to appear in this list. Double-clicking on a memorized activity automatically recalls filter selections, then displays the results. **Organize Views List button** provides a way to the change displayed sequence for activities in the tree list.



*Activity Log—**View Definition Tab***

2 View Selection Tabs

The **View Definition** tab allows setup of a new activity. Once the activity is set up, press the **View Results** tab to display the results.

3 Date Range Selection

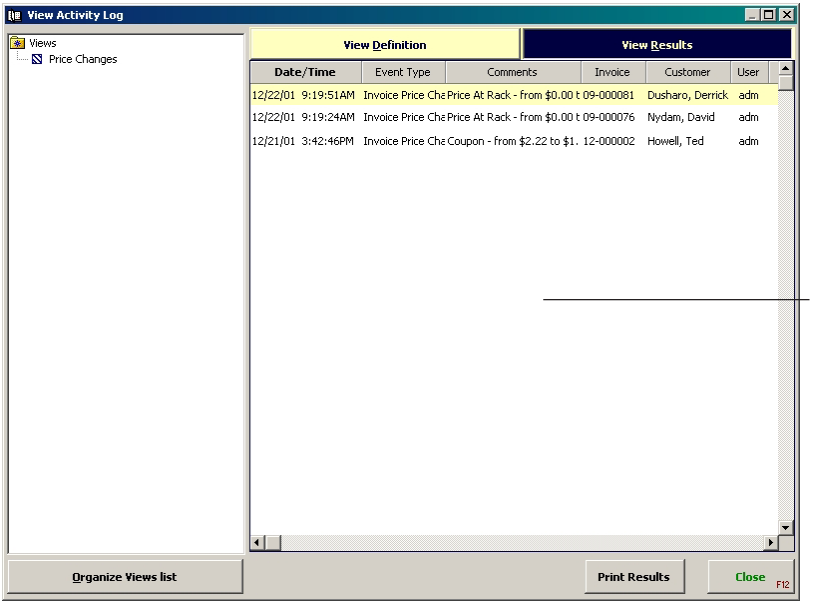
Allows predefined date types and ranges to be quickly established.

- **Quick Date**—Dropdown contains one of several date types.
- **From**—Active for certain date types, selects starting date.
- **To**—Active for certain date types, selects ending date.

4 Filter Selection

A check in the *All* box marks all entries for filter inclusion. A blank checkbox unmarks all entries, allowing individual items to be marked.

- **Event Type**—Selects of one or more unique system events. Key events, such a voiding orders or deleting an invoice, are automatically logged by the system.
- **User**—Selects one or more clerks who could have performed an event. This is only active if security is active using **PIN** entry.
- **Workstation**—Selects one or more event workstations.



*Activity Log—**View Results Tab***

5 Manual Filter Selection

- **Invoice Number**—Enter an invoice number to narrow the search to a single order for the selected filter types.
- **Customer Name**—Enter a customer name to narrow the search to a single customer for the selected filter types.
- **Comments**—Used to annotate memorized activity.

6 Memorize Activity Buttons

- **Update View**—Includes the latest change to the activity view.
- **Add to View List**—Adds a new activity to the list.

7 Process Buttons

- **Print Results**—Prints a hard copy of the current results view.
- **Close [F12]**—Exits back to the **HP**.

VIEW RESULTS TAB

Select this tab to display results from the **View Definition** tab.

8 Event Display

Once the criteria has been established, the results are viewed and optionally printed from this tab.

Menu Function View

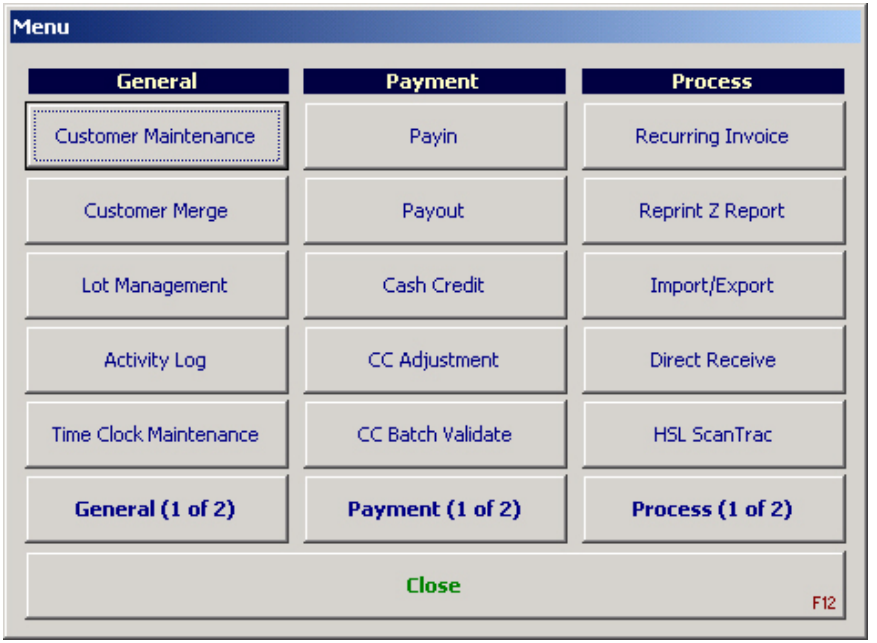
Menu View

General Functions

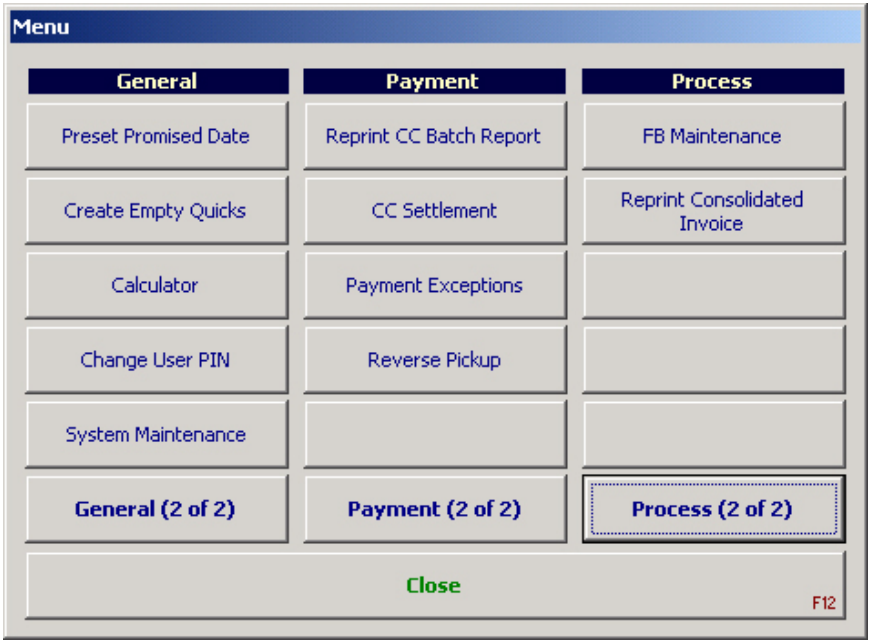
Payment Functions

Process Functions

The **Menu [F3]** *view contains a variety of less frequently used, but useful functions involving the customer,* **CC**, *time clock, cash drawer, system functions, etc. Since most Menu choices are management level functions, the use of configured* **PIN** *access is highly suggested, since many of these functions are management level.*



*Menu Utility Dialog—**Buttons 1 of 2***



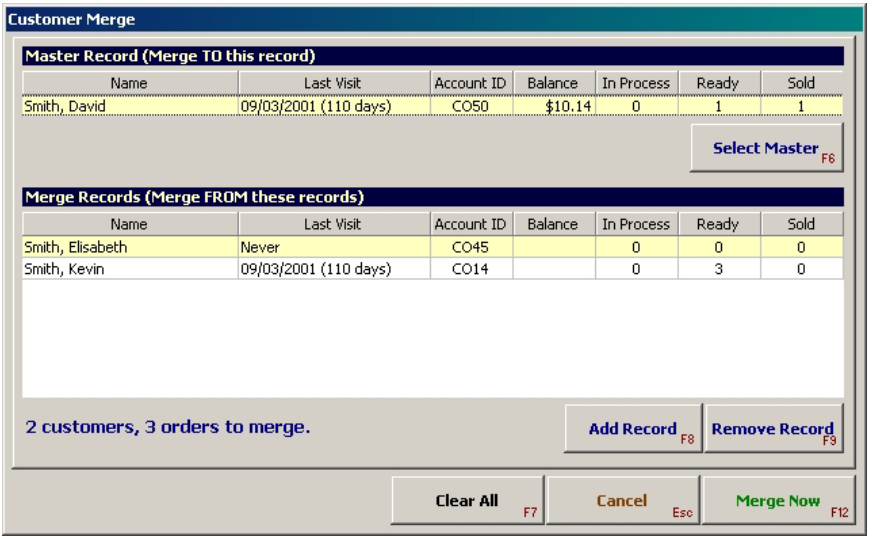
*Menu Utility Dialog—**Buttons 2 of 2***

Menu View

The **Menu [F3]** button provides quick access to these three groups of useful functions. When finished with a selected menu function, the system automatically returns control back to the view displayed prior to accessing the menu function. Additional functions are available by pressing the last button in each column—i.e., the **General (1 of 2)**. Most functions can be access restricted using **PIN**s. (*NOTE: New menu functions are added to SPOT on a continual basis, so the menu shown on the opposite page may differ from that on your SPOT system version.*)

General Functions

- **Customer Maintenance**—This button provides direct access to the Customer View (**CV**) via the Customer Lookup (**CL**) function. It allows editing of all customer record fields, even those restricted as a result of normal order processing access. Repeated access to multiple customers is possible making this utility perfect when similar changes to many customers is necessary. This utility has one other important feature, it displays all customers including inactive customers (an option also available in the **CV General** tab). The **CL** view in all other areas of the system, such as Quick, Detail, Pickup, etc., lists only active customers.
- **Customer Merge**—Provides a way to merge multiple customer records and associated statistics into one. This useful utility helps consolidate several customer records that are created inadvertently, each with processed orders. Select a single master customer, then all other customers to be merged to the master. Note that merged records cannot be unmerged.
- **Lot Management**—Displays the Lot Manager view.
- **Activity Log**—The activity log provides a detailed chronological audit trail of system use by all clerks using a **PIN**. Inactivating clerk-level **PIN** security entry eliminates availability of chronological information sorted by clerk. This utility is a great tool to identify clerk-related theft loss.
- **Time Clock Maintenance**—Provides access to the employee time clock editing function. Prior clock-in/out entries in any time clock record can be changed with ease.
- **Preset Promised Date**—Provides a way to override the automatically calculated order promised date for a set period of time. Normally, the promised date is preset to a specific date for a specific batch of detailed garments.

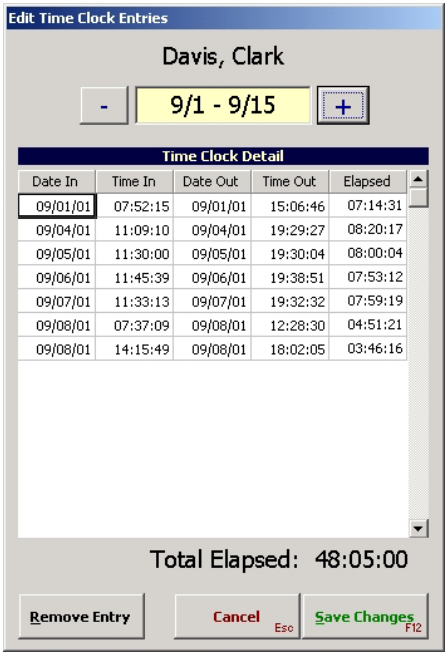


Menu Utility—***Customer Merge Dialog***

- **Create Empty Quicks**—Useful for drive-up windows, it allows on-the-fly preprinting of blank claim stubs with invoice numbers assigned. The customer and order information are then entered into SPOT during the Detail step.
- **Calculator**—Displays the standard Windows calculator. Either standard or scientific calculator modes can be selected.
- **Change User PIN**—Provides a user the ability to have the system issue an new **PIN** number. This can be used anytime a **PIN** number has been compromised.
- **System Maintenance**—FOR SPOT Business Systems SUPPORT PERSONNEL ONLY! Do not enter this function unless instructed to do so.

Payment Functions

- **Payin**—Allows tracking of funds going into the cash drawer outside of a normal order pickup function, such as money received from coin-op laundry machines.



*Menu Utility—**Time Clock Maintenance Dialog***

- **Payout**—Allows tracking of cash leaving the cash drawer such as COD's, supply purchases, etc.
- **Cash Credit**—Allows the posting of a cash credit amount to a customer's record. This is not **A/R** credit. Cash credits will be applied automatically as a negative adjustment during subsequent order pickups for the selected customer. Current cash credit amounts can be viewed at any time in the *Statistics* tab of the **CV**.
- **CC Adjustment**—Allows adjusting entries to be made on **CC**s for customers who have allowed **CCOF** access.
- **CC Batch Validate**—Used with **CCOF** batch payment processing.
- **Reprint CC Batch Report**—Prints a report that details **CC** batch payment history.
- **CC Settlement**—Submits transactions for payment processing to the payment processing network. This process in required only for Terminal Mode payment processing networks, such as VisaNet where settlement is required nightly. For Host Mode payment processors, such as PaymentTech, settlement occurs automatically.
- **Payment Exceptions**—Provides a special dialog used for dealing with declined **CC** transactions.

- **Reverse Pickup**—Allows an order to be changed from a *Sold* status to a *Detail* status, effectively un-selling the order. A reversed order displays a watermark of "Reversed Pickup" and all amounts are removed from the daily sales totals. An Activity Log entry shows the action. The order must be racked.

Process Functions

- **Recurring Invoice**—Sets up a memorized repeating invoice at will or on a predefined schedule for any selected customer. This function is needed for some commercial accounts that are typically billed on a regular basis.
- **Reprint Z Report**—Provides access to prior cashout reports and drawer balances.
- **Import/Export**—Provides a utility for extracting data from SPOT.
- **Direct Receive**—Used to quickly enter existing inventory into SPOT in a new installation. It essentially allows detailing an order without the detail, just totals.
- **HSL ScanTrac**—Provides processing history based on barcoded Heat Seal Labels (HSL) applied to each garment.
- **FB Maintenance**—Used for frequent buyer program maintenance.
- **Reprint Consolidated Invoice**—Uncommonly used, this speciality consolidated invoice is an 8.5 x 11 full-sized invoice that contains a list of all orders and amounts due.

Backups and Archiving

Backup Considerations

Archive Manager

The importance of backing-up and protecting your valuable operational database files against loss is unquestionable, yet most storeowners never concern themselves with data protection as long a their system is running properly. Every owner should take database backup seriously and assume a failure will occur in the future. This mind-set will ensure backups are performed on a regular basis. This section discusses database maintenance functions every owner should be aware of.

Backup Considerations

All computers use hard disk drives for data storage. Hard disk drives are sealed units containing non-removable magnetic storage disks that rotate at very high speeds. Data stored on this rotating disk becomes permanent until deleted. This means that all customer, invoice, route, accounts receivable, and configuration data is permanently stored in a typically safe place. However, because the hard disk drive is electromechanical, it can fail. Further, because the hard disk drive is sealed and contains non-removable magnetic media, getting at your data is almost impossible if it fails.

BACKUP DEVICE TYPES

Think of how difficult it would be if your all customer, order, or rack location information were totally gone in an instant. Fortunately, hard disk drives are fairly reliable, lasting 4-6 years on average. And, fortunately, there are good alternatives for efficiently and inexpensively backup your data. SPOT Business Systems business systems are shipped with a high-speed removable hard disk drive cartridge backup subsystem that provides automated daily backups (see *Hardware and Accessories* section of this manual).

We strongly suggest the use of this type of backup system because of its fast operation, removable cartridge, and ease of backup automation. In the event you have provided your own system hardware and integration, this type of subsystem is recommended. Do not use analog tape backup subsystems since they tend to be unreliable over time due to dust contamination. Our technical support personnel may not know how to help you restore data if you have an analog tape backup.

SYSTEM SIZE AND BACKUPS

For the most part, the standard cartridge subsystem mentioned above will handle data backups for local area systems with up to 15 workstations in a single location. Larger local area systems or hosted centralized systems will require additional consideration. In these cases, the use of sophisticated *Raid Arrays* or digital tape backups may be the best option. Contact SPOT Business Systems for recommendations.

OFFSITE BACKUP STORAGE

It is *always* a good practice to take a backup offsite periodically—once a week or every month at a minimum. Either a fire or burglary could result in data loss equivalent to a hard drive failure. The importance of removable media is underscored here. Make sure to have additional removable cartridges for rotation in/out of offsite storage.

PROGRAM STARTUP WARNINGS

SPOT automatically checks several important aspects of the hard disk drive system each time it is started up. In the event of an abnormal condition, a warning dialog will appear indicating the problem. It is strongly advised that SPOT Business Systems technical support be contacted if either of the two warnings appear:

- **Improper Backup**—If a backup does not exist or if there is no valid path to a backup file, a warning dialog appears. Ignoring this warning could result in total database loss if the primary hard disk drive fails and no backup data exists. Take this warning very seriously!
- **Hard Drive 80% Full**—If the database grows to a size that is 80% of maximum hard drive storage capacity or maximum record size, a warning dialog appears. SPOT uses Microsoft SQL database engine. As installed from the SPOT CDROM, a free version, called the Microsoft SQL Express, is used. This version has a 4-GByte data storage limit. The fee-based version of SQL has no such limitation. Shrinking or archiving database files periodically should keep your database size well below the 4-Gbyte limit.

SPOTscan Operation

Overview

Order Racking

Physical Inventory

Processing Steps

Ready Orders Backup

*SPOTscan is an intelligent handheld PDA laser barcode scanner that provides several useful operational functions without tying up a workstation (as a typical barcode reader would). It operates autonomously without the need for extension cables until data is downloaded to SPOT. The unit comes with rechargeable lithium ion batteries, docking station, built-in laser scanner, touch screen, memory, and SPOT compatible interface software. In addition to standard Palm PDA software application modules included with the unit, SPOT Business Systems has created custom PDA application modules specific to the operational needs of drycleaners. These drycleaning application modules include order racking, physical inventory, and process step tracking. Each SPOT*scan *application module links with SPOT drycleaning management software to download its scanned data. Therefore, SPOT*scan *can't be used without SPOT.*

SPOTscan Handheld Scanner

Overview

Only those elements of SPOT*scan* that apply to SPOT drycleaning application functions are described below. Refer to the manufacturers manual for PDA functional use.

SPOT*SCAN* ELEMENTS

1 Scan Window

A built-in laser emits a red colored line used for targeting the barcode being scanned. Barcodes can be scanned reliably from a distance of 6-9 inches. *NOTE: Permanent vision damage may occur if the activated laser light is pointed directly at the eye.*

2 Scan Decode LED

Briefly glows green when a valid barcode has been scanned and decoded. An audible beep is also sounded in concurrence with this indicator.

3 Scan Trigger
The laser scanner is activated by pressing either of these *trigger* buttons.

4 Touch Screen Display
Provides a convenient method for selecting applications and responding to application prompts using either the finger or the attached stylus pen (found on the back of the unit).

5 Display Contrast
Provides access to the display contrast adjustment.

6 Power Button & Backlight Control
Turns the unit off/on and activates the touch screen backlight feature.

INSTALLED APPLICATIONS
SPOT*scan* is shipped with *Order Racking*, *Physical Inventory*, *Processing Steps*, and *Ready Orders Backup* modules pre-installed. Future software modules can ordered and installed separately. The alternate *SPOTscanPC* wireless terminal is designed to handle additional functions such as Electronic Route Manifest (ERM) and drive-thru windows. Contact SPOT Business Systems for portable scanner pricing and availability.

SPOTSCAN USE NOTES
- **SPOT Version Requirement**—The features discussed herein are supported on SPOT software version 3.50 and greater.
- **Power Up**—If power is turned off scanned data is not lost.
- **Batteries**—The unit runs on a Lithium Ion battery. A graphic battery life indicator appears in the top center of the active touch screen display. Battery life varies greatly with laser scanning use. Thousands of barcodes can be scanned before batteries require charging. The unit will stop functioning prior to total battery depletion. Place SPOT*scan* in charger/docking bay when not in use.
- **Wrist Strap**—The unit is equipped with an elastic wrist strap to help secure the unit firmly in the hand during use.
- **Authorization Code**—Every SPOT related application requires a license in the form of an authorization code. The authorization code is also pre-installed in every new SPOT*scan* shipped. If the battery is removed for more than 60 seconds or allowed to completely discharge, the authorization code is lost requiring reauthorization and setup using the supplied CDROM.
- **Reset Button**—If the unit fails to function properly, a nondestructive reset can be performed by pressing the *Reset* button located next to the battery (a removed cover exposes this button).

SPOT SETUP

In order to use SPOT*scan*, you must first configure SPOT software to recognize its existence. This is a fairly simple process; however, you must know which serial port SPOT*scan*'s charger docking base will be connected to. Use the following steps:

1. Select the *Setup* dropdown from the Home Page.
2. Select *Program Configuration* > *Workstation Settings* > *SPOTscan Settings*.
3. Enter port number "1" for com1: or "2" for com2:.
4. Select Baud Rate of 57,600 (must match SPOT*scan* setting as set up in *Menu* > *Store Preferences*).
5. Press the *Save* button to save and exit back to the Home Page.

Application Installation Utility

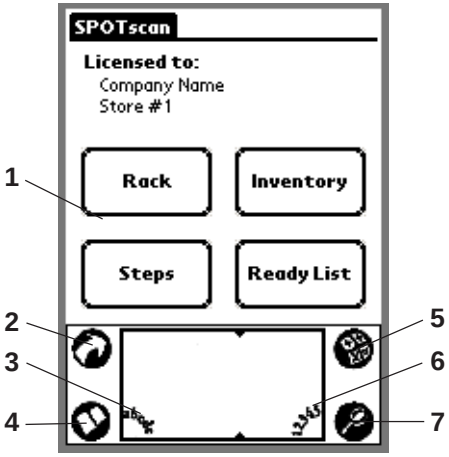
SPOT*scan* is normally shipped with application software pre-installed and a CDROM containing program loading utilities used to reinstall SPOT Business Systems applications from a computer if required. **Do not lose this CDROM**. These files are also contained on the SPOT Installation CDROM. Drycleaning applications and updates can be shipped on floppy disk or via the Internet as an alternative.

SPOT*SCAN* STARTUP

To activate the unit and prepare it for drycleaning application use, perform the following steps:

1. Press power button.
2. Touch the SPOT logo appearing on the screen.
3. License and store number information is displayed.
4. Drycleaning applications buttons appear for selection.

If an application was active when power was turned off, that application is automatically selected when subsequently powered back on. Note that the unit will automatically power-down if no activity occurs for about two minutes—no data is lost if this happens.



SPOTscan Function Select View

TOUCH SCREEN DISPLAY ELEMENTS

1 Function Selection Area

SPOT*scan* functions and operations are selected and viewed.

2 Home Button

Exits back to main PDA selection view.

3 Alpha Keyboard Button

Displays an alphabetical keyboard for character entry with the stylus.

4 Menu Button

Displays a context sensitive dropdown configuration menu. The contents change with each selected function and is active only within the selected function. These choices are not normally needed by a user.

5 Calculator Button

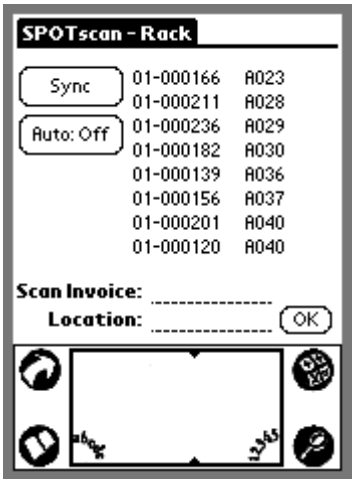
Displays a calculator.

6 Numeric Keypad Button

Displays a numeric keypad for number entry with the stylus.

7 Find Button

Magnifies the keyboard as an aid to find small text. This button is rarely used with SPOT*scan*.



*SPOTscan Display—**Rack View Auto Off***

Order Racking

Using SPOT*scan* in the *Rack* mode allows orders to be racked to either a numbered conveyor or slick rail using almost any type of rail identification scheme imagined. Multiple units can be used for racking multiple orders. Note that the term slick rail implies any non-conveyor location such as shelf, route truck trolley, etc.

RACKING TO A NUMBERED CONVEYOR

Racking to a numbered conveyor requires two steps for each order: (1) scan the invoice number, then (2) scan the rack number (SPOT Business Systems provides compatible adhesive barcoded conveyor link labels). SPOT*scan* has been specifically designed to prevent an out-of-sequence barcode scan by disabling the laser scanner from operating. For example, if you have accidentally scanned either the conveyor or invoice number out of sequence, the red laser will cease to operate until you acknowledge the error on the touch screen. This approach warns the user of a problem even if store noise levels prevent hearing the audible warning beep on the unit.

Setup

1. Select the ***Rack*** function
2. Toggle *Auto:* touch button to indicate "Off"

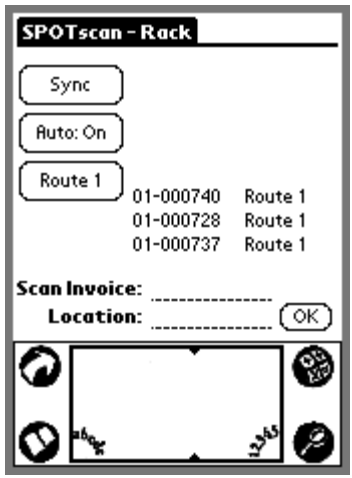
Scanning

1. Press either *Scan Trigger* to scan an invoice barcode
2. Press either *Scan Trigger* to scan the conveyor barcode
3. Repeat the process until all orders are racked

Transferring

1. Dock SPOT*scan* in the charger docking base
2. From the Home Page press the *Rack* button
3. Press the *SPOTscan Sync* button in the *Rack* view
4. Press the *Start Sync* button from the dialog
5. Press the *Sync* button on SPOT*scan* touch screen
6. Data is then transferred to SPOT
7. Orders are automatically racked and displayed

*NOTE: For **auto** racking mode, press the "Auto:" button to display "Auto: On". Racking mode remains in effect until changed.*



*SPOTscan Display—**Rack View Auto On***

RACKING TO A SLICK RAIL

Racking to a slick rail requires only one step for each order: (1) scan the invoice number. SPOT assigns the selected auto-racking location type. For example, if you set up SPOT for auto-racking using the *first initial of the customer's last name* for a customer named Bill Williams, SPOT automatically assigns a rack number of "W" for each racked order for Bill Williams.

Setup

1. Select the ***Rack*** function
2. Press the *Auto:* touch button to indicate "On"
3. The touch button below *Auto:* must show "<*Assign*>"
4. If not, press <*Assign*>, press *Clear*, press *Accept*

Scanning

1. Press either *Scan Trigger* to scan an invoice
2. Repeat the process until all orders are racked

Transferring

1. Dock SPOT*scan* in the charger docking base
2. From the Home Page press the *Rack* button
3. Select *Auto-Assign* type
4. Press the *SPOTscan Sync* button in the *Rack* view
5. Press the *Start Sync* button from the dialog
6. Press the *Sync* button on SPOT*scan* touch screen
7. Data is then transferred to SPOT
8. Orders are automatically racked and displayed

NOTE: For ***numeric*** *racking mode, press the "Auto:" button to display "Auto: Off". Racking mode remains in effect until changed.*

RACKING TO A USER ASSIGNABLE LOCATION

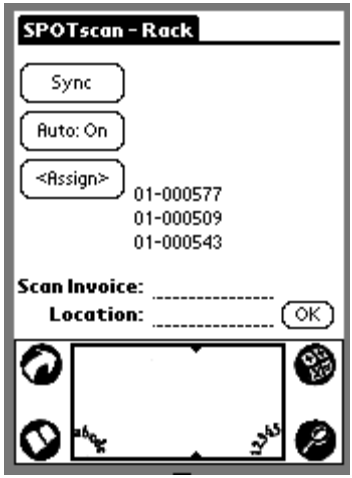
This procedure is similar to the slick rail process above, but allows the user to identify the location on SPOT*scan* directly. SPOT will then automatically assign this specified identifier as the rack location during the transfer process. For example, enter the word "Route1" and rack numbers are logged in SPOT using this location identifier.

Setup

1. Select the ***Rack*** function
2. Press the *Auto:* touch button to indicate "On"
3. Press the *Assign* touch button
4. Enter or scan the rack assignment text, press *Accept*

Scanning

1. Press either *Scan Trigger* to scan an invoice
2. Repeat the process until all orders are racked



*SPOTscan Display—**Rack View Assignment***

Transferring

1. Dock SPOT*scan* in the charger docking base
2. From the Home Page press the *Rack* button
3. Press the *SPOTscan Sync* button in the *Rack* view
4. Press the *Start Sync* button from the dialog
5. Press the *Sync* button on SPOT*scan* touch screen
6. Data is then transferred to SPOT
7. Orders are automatically racked and displayed

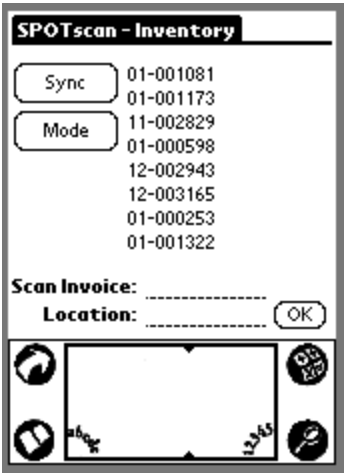
*NOTE: For **numeric** racking mode, press the "Auto:" button to display "Auto: Off". Racking mode remains in effect until changed.*

Physical Inventory

Using **S**POT*scan* in the *Inventory* mode provides a way to conduct physical order inventories without cords or distance constraints. Multiple SPOT*scan* units can be used for inventorying large stores.

PERFORMING A CONTINUOUS PHYSICAL INVENTORY

With a continuous inventory, you scan the barcode printed on each invoice from start to finish, transfer scanned barcode data, then allow SPOT to reconcile scanned physical inventory against its internal inventory status. SPOT's physical inventory exception lists are then updated to reflect order status. An exception report can be printed. See the *Operational Utilities* section for additional details on this function.



*SPOTscan Display—**Inventory View***

Setup

1 Select the ***Inventory*** function

Scanning

1 Press either *Scan Trigger* to scan each invoice
2 Repeat the process until all orders are scanned

Transferring

1 Dock SPOT*scan* in the charger docking base
2 From the Home Page press the *System* tab
3 From the *System* tab press the *Physical Inventory* button
4 Press the *Scan Inventory* button
5 Press the *SPOTscan Sync* button
6 Press the *Start Sync* button from the dialog
7 Press the *Sync* button on SPOT*scan* touch screen
8 Data is then transferred to SPOT
9 Inventory is automatically reconciled and displayed

PERFORMING AN INTERMITTENT PHYSICAL INVENTORY

With a intermittent inventory, you scan each barcoded invoice in intervals (interrupted to assist customers), transfer scanned barcode data, and allow SPOT to reconcile scanned physical inventory against its internal inventory. To do this, do not reset the Physical Inventory session when prompted from SPOT.

PERFORMING AN INVENTORY WITH LOCATION SCAN

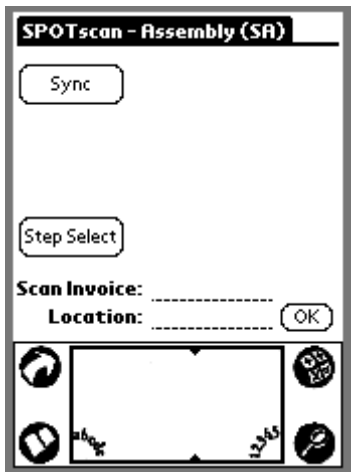
The *Normal* mode discussed above captures inventory without requiring conveyor location information. There are two additional modes available that compare orders to assigned conveyor locations. The advantage to performing an inventory with location checking is identifying misfiled conveyor orders. The inventory mode is changed by pressing the **Normal** button, cycling through each of the three modes:

- **Normal**—No locations are captured.
- **Rack Each**—Capture locations by scanning each invoice/rack location pair in a similar fashion to the racking function.
- **Rack Multi**—Capture locations by first scanning a location and then each invoice at the same location. Scanning a new location causes all subsequent invoice scans to be paired with that new location. This mode is useful when multiple orders are assigned to a single conveyor link rather than individual link slots.

Transferring data in this mode is similar to the *Normal* inventory function, except that prior to selecting *SPOTscan Sync*, the *Do Not Expect Scanned Locations* (in the upper right corner) must be selected to indicate *Expect Scanned Locations*.

Processing Steps

Processing step scanning is similar to the order *Racking* function and scans orders through one or more user-definable processing steps.



SPOTscan Display—***Processing Step View***

PROCESSING STEPS VIEW

The major elements of this view are as follows:

- **Current Selection**—Listed at top (title bar) of the view. The currently selected store's mnemonic is displayed in parenthesis.
- **Upload Button**—Select to upload all scans into SPOT.
- **Step Select Button**—Select to choose a step. Disappears when items are scanned and waiting for upload.
- **Scan Invoice Field**—Cursor flashes here when the scanner is waiting for an invoice scan.
- **Scan Location Field**—Currently not supported in SPOT.
- **Ok Button**—Used to accept a manually entered invoice number.

Setup

1. Select the ***Processing Steps*** function.
2. Press the *Step Select* button.
3. Highlight the desired step, press *Accept*.
4. If prompted, highlight the desired store and press *Accept*.

Scanning

1. Press either *Scan Trigger* to scan an invoice.
2. Repeat the process for each order in the selected step.

NOTE: The system will remove the Step Select button with the first scan, and will reinstate this button after a successful upload. This means that orders for only one step at a time may be processed between uploads.

Transferring

1. Dock SPOT*scan* in the charger docking base.
2. From the Home Page press the *Process Steps* button.
3. Select the correct step (must exactly match the selected step in SPOT*scan*).
4. Press the *Start Sync* button from the dialog.
5. Press the *Sync* button on SPOT*scan* touch screen.
6. Data is then transferred to SPOT.
7. Orders are automatically racked and displayed.

CHANGING THE ACTIVE STEP AND STORE

The *Step Select* view is invoked when the *Step Select* button is pressed. The *Store Select* view is invoked when a process step is selected that prompts for the store mnemonic (see *Adding a New Step*).

Navigating Step and Store Select Views

In some instances, the number of user-defined process steps to select may grow too large to list in a single view. When this happens, the user may scroll through the items by using the arrow buttons located in the lower right corner of the view. The action taken each time an arrow key is pressed is determined by the button immediately to the left of the arrows. The default selection is *Page*.

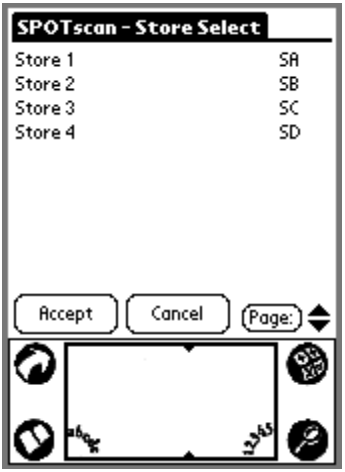
- Press the *Page* button, and the button will change to *Line*.
- Press the *Line* button, and it will change to *Move*. This is a special mode, and is discussed later under the section *Rearranging Steps*.

*SPOTscan Display—**Step Select View***

Step Select View

The major elements of this view are as follows:

- **List of Steps**—Shows the name of the step, the store mnemonic if specified for the step, and the step abbreviation.
- **Accept Button**—Accepts the currently highlighted step, and returns to the scan view.
- **Cancel Button**—Returns to the scan view with no changes.
- **Page Button**—Selects the *Up/Down* arrow mode:
  Page—Arrows page up/down through the step list.
  Line—Arrows move the highlight up or down one line.
  Move—Arrows move the highlighted step up/down one selection.
- **Arrow Buttons**—Used for navigation through multiple views.



*SPOTscan Display—**Store Select View***

Store Select View

The controls on this view are identical to the *Step Select* view. The major elements of this view are as follows:

- **List of Stores**—Shows the name of the store and store abbreviation.
- **Accept Button**—Accepts the currently highlighted store, and returns to the scan view.
- **Cancel Button**—Returns to the scan view with no changes.
- **Page Button**—Selects the *Up/Down* arrow mode:
  Page—Arrows page up/down through the store list.
  Line—Arrows move the highlight up or down one line.
  Move—Arrows move the highlighted store up/down one selection.
- **Arrow Buttons**—Used for navigation through multiple views.

*SPOTscan Display—**Adding New Step View***

ADD/MODIFY/REMOVE STEPS

The operator may add, modify or remove steps. Make sure the system is at the *Process Steps* scanning view, and that there are no orders waiting to upload.

1. Press the *Step Select* button
2. Highlight the desired step (except for *New Entry*)
3. Press the *Menu* button
4. Select the desired action (*New Entry*, *Edit Entry*, or *Delete Entry*)

Adding a New Step

Select *New Entry*, and the user is presented with a form to fill out for the following fields:

- **Description**—Name of the step. **NOTE:** *This must be identical to the scan step as identified in SPOT, including case and spacing.* If this is not accomplished, the upload will fail. Test each new step with a single scan and upload.
- **Abbreviation**—This shows on the view with each scan, to indicate which scan step is selected.
- **Mnemonic Check**—Select from *Orig* or *Dest*. Each SPOT barcode encodes the originating store, and also the destination store (if an order is dropped off at one store, and must be picked up at another). This selection determines which is to be validated.

- **Store Mnemonic**—Select from *Any*, *Store*, *Step*, or *Prompt*.
  Any—SPOT*scan* will not validate the store, but will allow SPOT to perform this validation.
  Store—SPOT*scan* will validate the step against the Mnemonic established in the "Store Preferences" section.
  Step—The store mnemonic to validate will be specified in the subsequent field.
  Prompt—SPOT*scan* will prompt the user for the store upon selection of the step.
- **Allow Location Scan**—Future.
- **Accept**—Accepts the input and returns to the scan step selection view.
- **Cancel**—Cancels any changes and returns to the scan step selection view.

NOTE: New steps are always placed at the bottom of the list. Please refer to the section below titled Rearranging Steps.

Modifying an Existing Step

- Select *Edit Entry*, the user is presented with the same form as above, with the information filled in for the highlighted step.

Remove an Existing Step

- Select *Delete Entry*, the user is presented with a confirmation: "Are You Sure?" Select *Yes* or *No*.

Rearrange Steps

This mode is used to rearrange steps, so the user can easily place the most often used steps at the top of the list, or put entries in the list in alphabetical order. Once the mode is set to *Move*, pressing the arrow keys moves the highlighted step either up or down in the list.

A step at the top of the list will not wrap to the bottom of the list with the next attempted move, and visa-versa. The system will permanently remember the new order once the list is exited. Note that pressing *Cancel* will not restore the previous list order.

- Press the *Page* or *Line* button until the caption changes to *Move*.

*SPOTscan Display—**Store Information View***

ADD/MODIFY/REMOVE STORES

The operator may add, modify or remove stores. Make sure the system is at the *Processing Steps* scanning view, and that there are no orders waiting to upload.

1. Press the ***Step Select*** button.
2. Select a step that prompts for a store.
3. Highlight the desired store (except for *New Entry*).
4. Press the *Menu* button.
5. Select the desired action (*New Entry*, *Edit Entry*, or *Delete Entry*).

Adding a New Store

Select *New Entry*, and the user is presented with a form to fill out for the following fields:

- **Description**—Store name/number for operator reference.
- **Mnemonic**—This is the mnemonic (encoded in each SPOT barcode) that will be validated when orders are scanned.

  NOTE: New stores are always placed at the bottom of the list. Please refer to the section below titled Rearranging Stores.

Modifying an Existing Store

- Select *Edit Entry*, the user is presented with the same form as above, with the information filled in for the highlighted store.

Remove an Existing Store

- Select *Delete Entry*, the user will be presented with a confirmation: "Are You Sure?" Select *Yes* or *No*.

Rearrange Stores

This mode is used to rearrange stores, so the user can easily place the most often used store at the top of the list, or put entries in the list in alphabetical order. Once the mode is set to *Move*, pressing the arrow keys moves the highlighted store either up or down in the list.

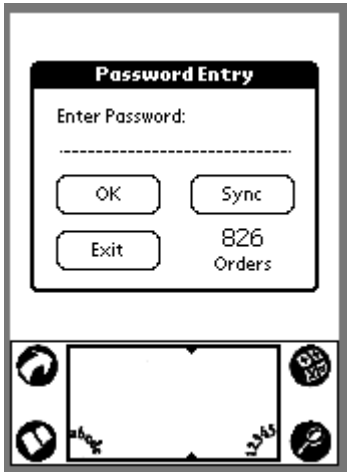
A store at the top of the list will not wrap to the bottom of the list with the next attempted move, and visa-versa. The system will permanently remember the new order once the list is exited. Note that pressing *Cancel* will not restore the previous list order.

- Press the *Page* or *Line* button until the caption changes to *Move*.

Ready Orders Backup

SPOT and SPOT*scan* together provide a backup storage and retrieval function for orders racked to a conveyor. In the event of a computer failure or loss of power, racked order locations can be looked up from SPOT*scan* by customer name or phone number. The *Ready Order* backup process should be performed each evening during the nightly shutdown procedure or after all orders have been racked to ensure that the list of ready orders is current.

Note that this feature has special password protection as specified in the SPOT setup screen for the SPOT*scan* device (this is not a **PIN**). Password protection prevents unauthorized clerk access to rack locations to enhance cash controls. Once the correct password is given, the function is unlocked until a new data transfer refreshes the ready order data (and password) or the function is explicitly locked by a user. If a password is not specified, the password entry is not required.



*SPOTscan Display—**Password Entry View***

TRANSFERRING THE READY ORDERS LIST

Before this SPOT*scan* function can be used to find orders, all ready orders must be transferred from SPOT to SPOT*scan*. Note that this transfer is generally much larger than the typical transfer for *Physical Inventory* or *Racking*, taking a proportionately greater amount of time.

The ability to transfer ready orders to SPOT*scan* is not **PIN** protected and is conveniently accessed from either the *Password Entry* view or the *Ready Orders–Customers List* view (on SPOT*scan*). Transferring data is straightforward to encourage daily ready order backing up. The corresponding SPOT*scan Backup* button in the SPOT *Rack* view facilitates ready order backup when all racking for the day is completed.

Setup

1. Select the *Ready List* function.
2. If the *Password Entry* view is displayed, select *Sync* from the *Password Entry View*.
3. If the *Ready Orders–Customers* view is presented, select *Sync* from the *Ready Orders–Customers View*.

Transfer from Password Entry View

1. Dock SPOT*scan* in the charger docking base.
2. From the *Home Page* press the *Rack* button.
3. Press the SPOT*scan* Backup button in the Rack view.
4. Press the *Start Sync* button from the dialog.
5. Press the *Sync* button on SPOT*scan* touch screen.
6. Data is then transferred to SPOT*scan*.

Transfer from Ready Orders – Customers View

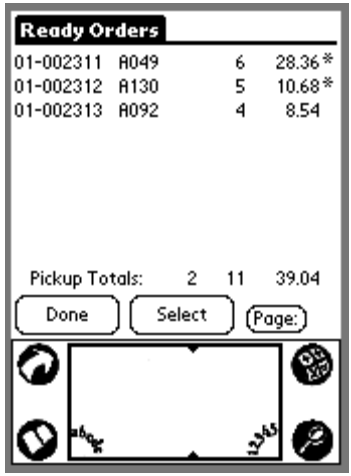
1. Dock SPOT*scan* in the charger docking base.
2. From the *Home Page* press the *Rack* button.
3. Press the SPOT*scan Backup* button in the *Rack* view.
4. Press the *Start Sync* button from the dialog.
5. Press the *Menu* button on lower left corner of SPOT*scan* screen.
6. Select the *Sync Order Data* option.
7. Data is then transferred to SPOT*scan*.
8. If a password is specified, SPOT*scan* will display the *Password Entry* view.

USING THE READY ORDERS LIST

Once SPOT*scan* contains the list of all ready orders and their locations, it can be used to find these orders in case the computer system in the store is down for any reason.

Orders are looked up on SPOT*scan* by customer and are listed either by name or phone (as specified in the SPOT settings for SPOT*scan*). The customer sort sequence specified by SPOT always places the primary lookup type in the left column. For example, if customers are to be accessed by name, customer names will be listed in the left-most column sorted alphabetically in ascending order (last name first) with phone numbers in the column to the right. Likewise, if customers are to be accessed by phone number, customer phone numbers will be listed in the left-most column in numerically ascending order with customer names in the column to the right.

The third column to the right never changes position and is the number of orders to be picked up for the selected customer. A dash (-) in this column indicates that no orders remain to be picked up, while a plus sign (+) indicates 10 or more orders exist.



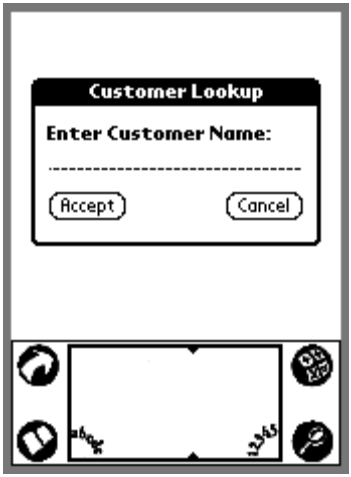
*SPOTscan Display—**Customers List & Ready Orders View***

Setup

1. Select the *Ready List* function.
2. If a password is specified, the *Password Entry* view is displayed.
3. Enter the password and press the *OK* button.

Picking Up Orders

1. Highlight the desired customer (use the up/down arrow buttons).
2. Press the *Select* button.
3. SPOT*scan* will display all *Ready Orders* for that customer, with location, piece count, and price.
4. Scan each order being picked up (use the *Select* button to manually mark orders).
5. SPOT*scan* marks each ready order being picked up with an asterisk (*) with the total amount displayed on the lower part of the screen.
6. When finished, press the *Done* button.



*SPOTscan Display—**Customer Lookup View***

FINDING CUSTOMERS QUICKLY

Customer lookup is determined by the type of data in the left-most column. If the customer name is in this column then lookup must be by customer name (last name first). If the customer phone is in this column, then lookup must be by phone number. When looking up a customer by name, it is best to enter only the first few letters of the last name. When looking up a customer by phone use only the standard seven digit number (as if for a local call–do not enter the area code).

Customer Lookup

1. From the *Ready Orders–Customers* view, press the *Search* button.
2. Enter the first few characters of the customer's last name or phone number.
3. Press the *Accept* button.
4. SPOT*scan* will return to the customer list with the closest match highlighted.

A Typical Operational Day

Typical Startup Procedures
Typical Shift Change Procedures
Typical Shutdown Procedures
Suggested Reports
Inventory and Cash Reporting

This section is designed to provide a glimpse at what happens during a typical day of operation. Focus is primarily on startup and shutdown procedures.

Typical Startup Procedures

CLOCKIN

- Use the **Time Clock [F10]** button to clockin. This is an optional step, but should include all clerks who begin work at the beginning of the day or shift change.

CASH DRAWER CHECKIN

- Use the **System** tab, **Drawer Checkin** button to checkin a drawer with a beginning cash balance. This process must be performed in order for counter clerks to have access to cash drawer related functions.

Typical Shift Change Procedures

CASH DRAWER CHECKOUT

- At the end of a shift use the **System** tab, **Drawer Checkout** button to checkout and balance the drawer against expected amounts. This process must be performed in order to release the cash drawer. Closeout reports are printed as a result of the checkout procedure.
- At the beginning of the next shift use the **System** tab, **Drawer Checkin** button to checkin a drawer with a beginning cash balance. Note that additional cash drawer trays are available to preload beginning cash amounts as a convenience.

Typical Shutdown Procedures

CASH DRAWER CHECKOUT

- Use the **System** tab, **Drawer Checkout** button to checkout and balance the drawer against expected amounts. Closeout reports are printed as a result of the checkout procedure.

NIGHTLY RECONCILIATION

- Use the **System** tab, **Reconciliation** button to view the status of all cash drawers in the system. Run reports queue.

DATA BACKUP

- Normally, backups are automated requiring the server to be left running at the end of the shutdown process.
- Perform *Ready Order* backup to SPOT*scan* (optional).

CLOCKOUT

- Use the Time Clock [F10] button to clockout.

Suggested Reports

The following reports should be viewed on a daily basis. They provide the minimum necessary information for business management. Other reports may provide additional operational insight depending on your needs and preferences. It is a good idea to preview all reports built into SPOT as a familiarization exercise.

- Z-Reports (nightly drawer closing)
- Sales > Incoming Summary
- Sales > Outgoing Summary
- Management > Cashout Summary
- Management > Transaction Detail Summary

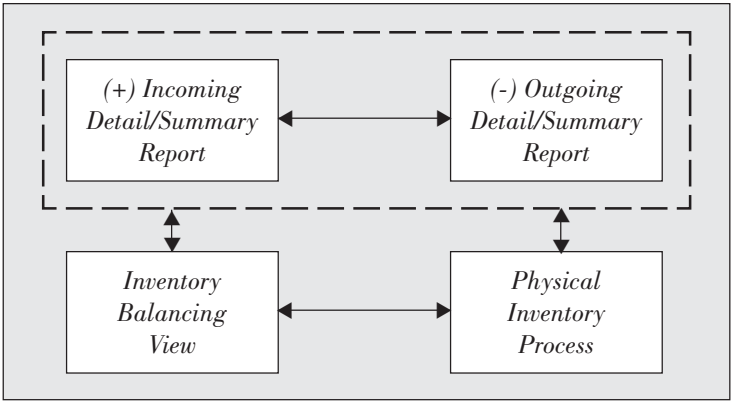
Note that the reconciliation view contains a list of available reports that can be checkmarked for inclusion in a report queue. The **Print Reports [F9]** button forces all checkmarked reports to print in succession. This is a very convenient way to automate daily or weekly report printing needs.

Inventory and Cash Reporting

INVENTORY REPORTS

In order to understand how inventory reporting works, it is important to understand the following definitions:

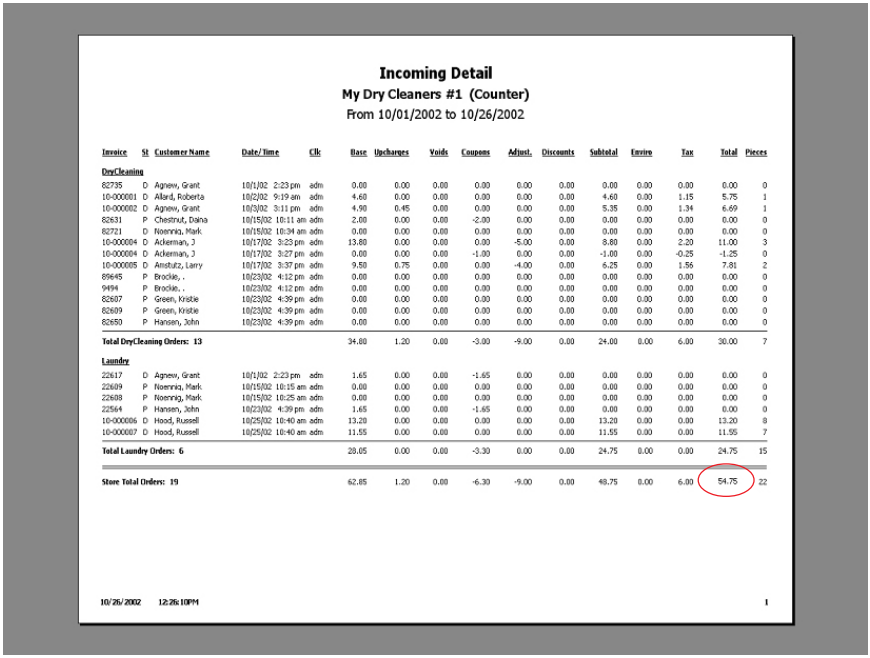
- **Incoming Detail/Summary Reports**—Shows the value of all in-process orders (Detailed and Racked) including any adjustments, coupons, and discounts taken during the reporting period. The report reflects the change in value of inventory for that day. For example, a $100 cleaning order with a $10 adjustment will increase the Incoming value by $110, while a $5 discount to that same order will decrease the Incoming value. Both reports are available in the *Sales* report group.
- **Outgoing Detail/Summary Reports**—Shows the total of all payments received against store inventory. The only thing that will change the outgoing value (other than a payment) is performing a *Reverse Pickup* on a sold order. Both reports are available in the *Sales* report group.
- **Inventory Balancing View**—Shows the daily balance summary by month. This view is available from *System > Inventory*.
- **Physical Inventory Process**—A utility used to perform physical barcoded inventories. This is available from *System > Inventory*.



Inventory Reporting Relationships

PHYSICAL INVENTORY BALANCING

In the real world, it is not necessary to perform this entire process frequently. Since the *Outgoing* and *Incoming* report totals are included in the Inventory balance view, comparing the *Physical Inventory* to the *Inventory Balance* for the same date will reveal an out of balance situation. The reports and views comprising this process are shown on the following pages with the value totals of each circled.



Incoming Detail

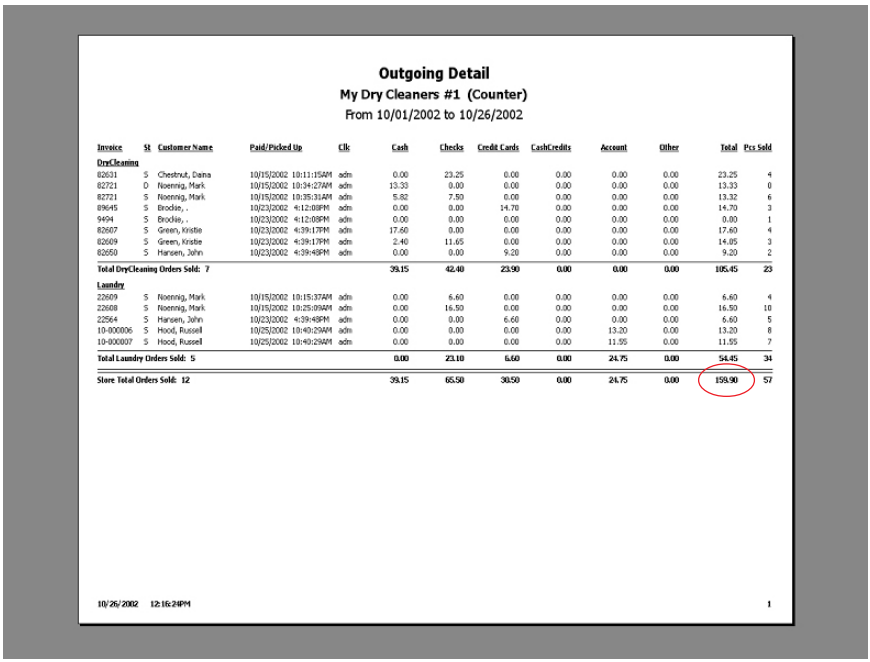
My Dry Cleaners #1 (Counter)

From 10/01/2002 to 10/26/2002

Invoice	St	Customer Name	Date/Time	Clk	Base	Upcharges	Voids	Coupons	Adjust.	Discounts	Subtotal	Enviro	Tax	Total	Pieces
DryCleaning															
82735	D	Agnew, Grant	10/1/02 2:23 pm	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
10-000001	D	Allard, Roberta	10/2/02 9:19 am	adm	4.60	0.00	0.00	0.00	0.00	0.00	4.60	0.00	1.15	5.75	1
10-000002	D	Agnew, Grant	10/3/02 3:11 pm	adm	4.90	0.45	0.00	0.00	0.00	0.00	5.35	0.00	1.34	6.69	1
82631	P	Chestnut, Daina	10/15/02 10:11 am	adm	2.00	0.00	0.00	-2.00	0.00	0.00	0.00	0.00	0.00	0.00	0
82721	D	Noennig, Mark	10/15/02 10:34 am	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
10-000004	D	Ackerman, J	10/17/02 3:23 pm	adm	13.80	0.00	0.00	0.00	-5.00	0.00	8.80	0.00	2.20	11.00	3
10-000004	D	Ackerman, J	10/17/02 3:27 pm	adm	0.00	0.00	0.00	-1.00	0.00	0.00	-1.00	0.00	-0.25	-1.25	0
10-000005	D	Amstutz, Larry	10/17/02 3:37 pm	adm	9.50	0.75	0.00	0.00	-4.00	0.00	6.25	0.00	1.56	7.81	2
89645	P	Brockie, .	10/23/02 4:12 pm	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
9494	P	Brockie, .	10/23/02 4:12 pm	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
82607	P	Green, Kristie	10/23/02 4:39 pm	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
82609	P	Green, Kristie	10/23/02 4:39 pm	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
82650	P	Hansen, John	10/23/02 4:39 pm	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Total DryCleaning Orders: 13					34.80	1.20	0.00	-3.00	-9.00	0.00	24.00	0.00	6.00	30.00	7
Laundry															
22617	D	Agnew, Grant	10/1/02 2:23 pm	adm	1.65	0.00	0.00	-1.65	0.00	0.00	0.00	0.00	0.00	0.00	0
22609	P	Noennig, Mark	10/15/02 10:15 am	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
22608	P	Noennig, Mark	10/15/02 10:25 am	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
22564	P	Hansen, John	10/23/02 4:39 pm	adm	1.65	0.00	0.00	-1.65	0.00	0.00	0.00	0.00	0.00	0.00	0
10-000006	D	Hood, Russell	10/25/02 10:40 am	adm	13.20	0.00	0.00	0.00	0.00	0.00	13.20	0.00	0.00	13.20	8
10-000007	D	Hood, Russell	10/25/02 10:40 am	adm	11.55	0.00	0.00	0.00	0.00	0.00	11.55	0.00	0.00	11.55	7
Total Laundry Orders: 6					28.05	0.00	0.00	-3.30	0.00	0.00	24.75	0.00	0.00	24.75	15
Store Total Orders: 19					62.85	1.20	0.00	-6.30	-9.00	0.00	48.75	0.00	6.00	54.75	22

10/26/2002 12:26:10PM 1

Incoming Detail Report



Outgoing Detail

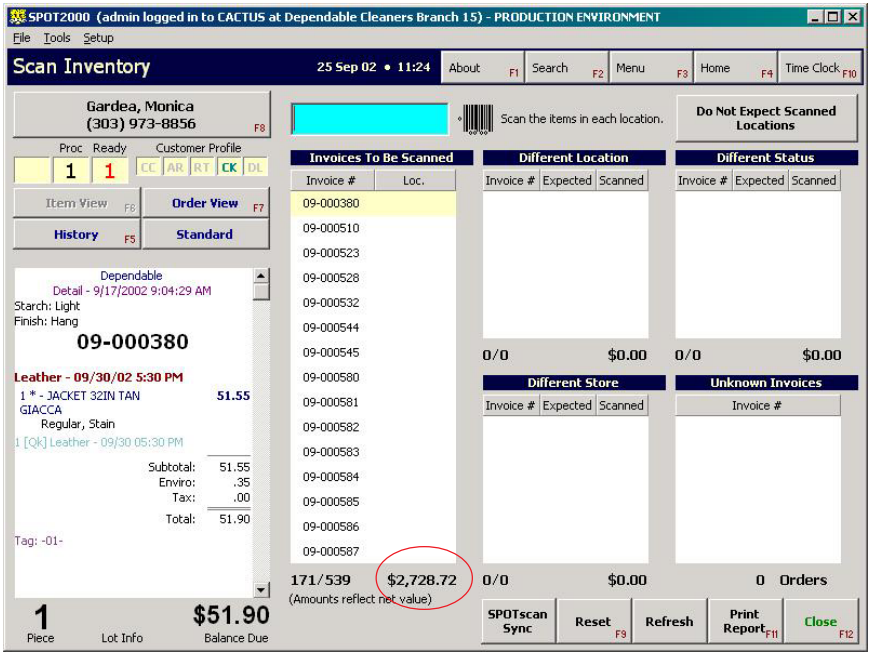
My Dry Cleaners #1 (Counter)

From 10/01/2002 to 10/26/2002

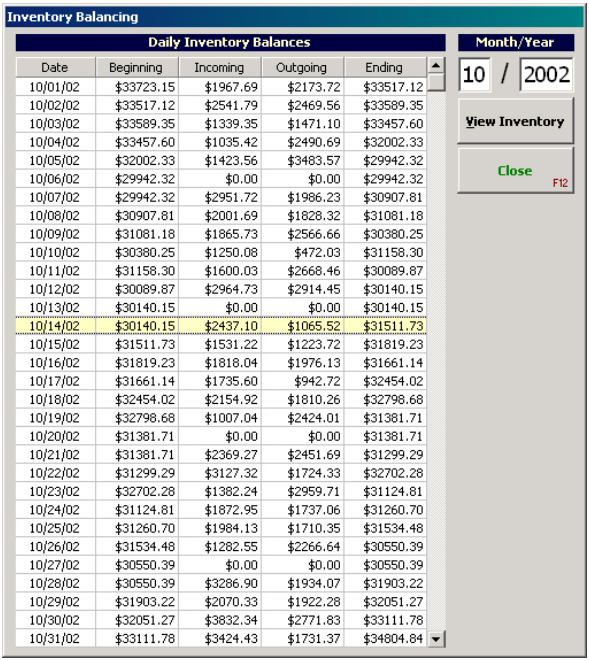
Invoice	St	Customer Name	Paid/Picked Up	Clk	Cash	Checks	Credit Cards	CashCredits	Account	Other	Total	Pcs Sold
DryCleaning												
82631	S	Chestnut, Daina	10/15/2002 10:11:15AM	adm	0.00	23.25	0.00	0.00	0.00	0.00	23.25	4
82721	D	Noennig, Mark	10/15/2002 10:34:27AM	adm	13.33	0.00	0.00	0.00	0.00	0.00	13.33	0
82721	S	Noennig, Mark	10/15/2002 10:35:31AM	adm	5.82	7.50	0.00	0.00	0.00	0.00	13.32	6
89645	S	Brockie, .	10/23/2002 4:12:08PM	adm	0.00	0.00	14.70	0.00	0.00	0.00	14.70	3
9494	S	Brockie, .	10/23/2002 4:12:08PM	adm	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1
82607	S	Green, Kristie	10/23/2002 4:39:17PM	adm	17.60	0.00	0.00	0.00	0.00	0.00	17.60	4
82609	S	Green, Kristie	10/23/2002 4:39:17PM	adm	2.40	11.65	0.00	0.00	0.00	0.00	14.05	3
82650	S	Hansen, John	10/23/2002 4:39:48PM	adm	0.00	0.00	9.20	0.00	0.00	0.00	9.20	2
Total DryCleaning Orders Sold: 7					39.15	42.40	23.90	0.00	0.00	0.00	105.45	23
Laundry												
22609	S	Noennig, Mark	10/15/2002 10:15:37AM	adm	0.00	6.60	0.00	0.00	0.00	0.00	6.60	4
22608	S	Noennig, Mark	10/15/2002 10:25:09AM	adm	0.00	16.50	0.00	0.00	0.00	0.00	16.50	10
22564	S	Hansen, John	10/23/2002 4:39:48PM	adm	0.00	0.00	6.60	0.00	0.00	0.00	6.60	5
10-000006	S	Hood, Russell	10/25/2002 10:40:29AM	adm	0.00	0.00	0.00	0.00	13.20	0.00	13.20	8
10-000007	S	Hood, Russell	10/25/2002 10:40:29AM	adm	0.00	0.00	0.00	0.00	11.55	0.00	11.55	7
Total Laundry Orders Sold: 5					0.00	23.10	6.60	0.00	24.75	0.00	54.45	34
Store Total Orders Sold: 12					39.15	65.50	30.50	0.00	24.75	0.00	159.90	57

10/26/2002 12:16:24PM 1

Outgoing Detail Report

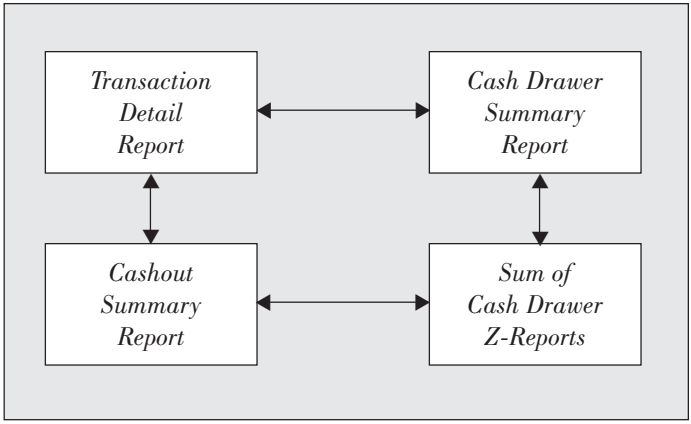


Physical Inventory View



Date	Beginning	Incoming	Outgoing	Ending
10/01/02	$33723.15	$1967.69	$2173.72	$33517.12
10/02/02	$33517.12	$2541.79	$2469.56	$33589.35
10/03/02	$33589.35	$1339.35	$1471.10	$33457.60
10/04/02	$33457.60	$1035.42	$2490.69	$32002.33
10/05/02	$32002.33	$1423.56	$3483.57	$29942.32
10/06/02	$29942.32	$0.00	$0.00	$29942.32
10/07/02	$29942.32	$2951.72	$1986.23	$30907.81
10/08/02	$30907.81	$2001.69	$1828.32	$31081.18
10/09/02	$31081.18	$1865.73	$2566.66	$30380.25
10/10/02	$30380.25	$1250.08	$472.03	$31158.30
10/11/02	$31158.30	$1600.03	$2668.46	$30089.87
10/12/02	$30089.87	$2964.73	$2914.45	$30140.15
10/13/02	$30140.15	$0.00	$0.00	$30140.15
10/14/02	$30140.15	$2437.10	$1065.52	$31511.73
10/15/02	$31511.73	$1531.22	$1223.72	$31819.23
10/16/02	$31819.23	$1818.04	$1976.13	$31661.14
10/17/02	$31661.14	$1735.60	$942.72	$32454.02
10/18/02	$32454.02	$2154.92	$1810.26	$32798.68
10/19/02	$32798.68	$1007.04	$2424.01	$31381.71
10/20/02	$31381.71	$0.00	$0.00	$31381.71
10/21/02	$31381.71	$2369.27	$2451.69	$31299.29
10/22/02	$31299.29	$3127.32	$1724.33	$32702.28
10/23/02	$32702.28	$1382.24	$2959.71	$31124.81
10/24/02	$31124.81	$1872.95	$1737.06	$31260.70
10/25/02	$31260.70	$1984.13	$1710.35	$31534.48
10/26/02	$31534.48	$1282.55	$2266.64	$30550.39
10/27/02	$30550.39	$0.00	$0.00	$30550.39
10/28/02	$30550.39	$3286.90	$1934.07	$31903.22
10/29/02	$31903.22	$2070.33	$1922.28	$32051.27
10/30/02	$32051.27	$3832.34	$2771.83	$33111.78
10/31/02	$33111.78	$3424.43	$1731.37	$34804.84

Inventory Balancing View

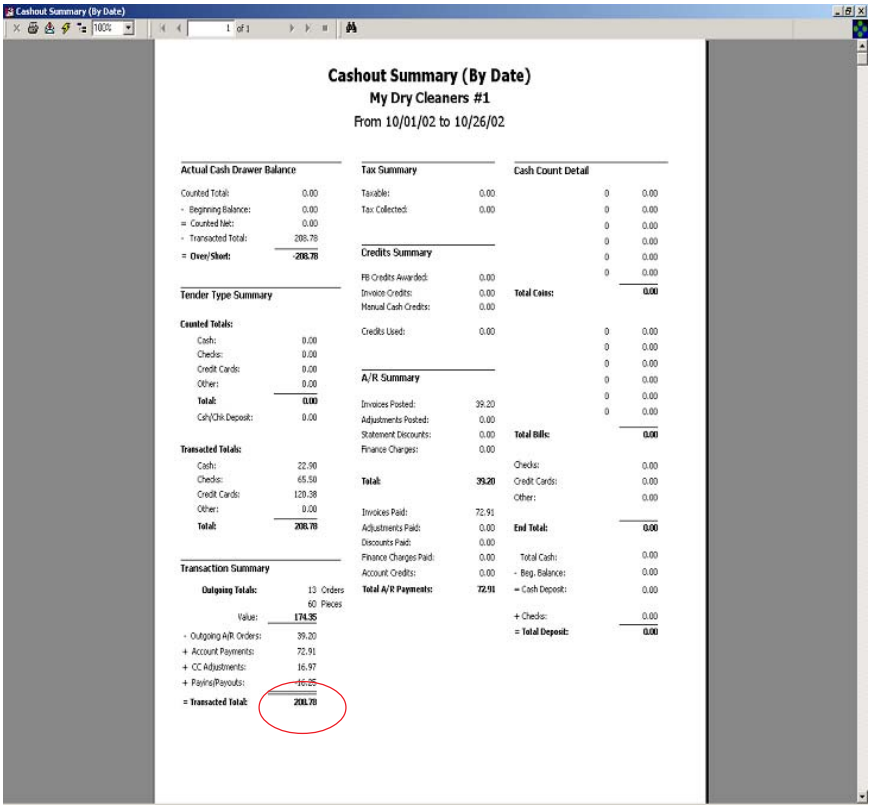


Cash Reporting Relationships

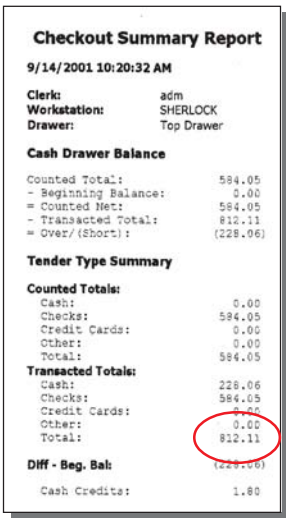
CASH BALANCING

Balancing cash is straight forward since totals on all four reports are equal.

- **Transaction Detail Report**—Shows the value of all payments, postings, payins, payouts, and **CC** adjustments. This is the detail of the *Transaction Summary* on the *Cashout Summary Report*. This report is available in the *Management* report group.
- **Cashout Summary Report**—Shows the value of all sold orders across all cash drawers. The *Transaction Summary* area shows the final *Transacted Total*. This report is available in the *Management* report group.
- **Cash Drawer Summary Report**—Shows the value of total sold orders by tender type. This report is available in the *Management* report group.
- **Sum of Z-Reports**—The nightly drawer checkout report for each cash drawer is added together for a single total. The nightly closeout procedures are available in the *System* > *Checkout*.



*Cashout Summary by Date Report—**Transacted Total***



*Checkout Summary Z-Report—**Transacted Total***

Cash Drawer Types

All payments are linked to a cash drawer. There are two types of cash drawers:

- **Physical**—Actuated by SPOT200 under program control and mounted under the counter, this type of cash drawer receives real cash tender.
- **Logical**—Not a real cash drawer, but a virtual entity that acts like a physical cash drawer. Logic drawers are used to receive A/R and Route payments that are normally not placed in a physical cash drawer (although a physical cash drawer can be used as well).
  NOTE: *Z-Reports show payments for all cash drawers, physical and logical. If A/R and Routes are not established for payments to go to logical cash drawers, payments to these types will not appear in the Z-Report and therefore will not be counted in the balancing process.*

Logical cash drawers for both A/R and Routes can be setup under configuration control at *Site Settings > Cashier Settings > Require Active Cash Drawer > Edit*.

Quick Reference Guide

Order Production

Exception Handing

Customer Maintenance

This section provides a handy step-by-step "How To" guide to using SPOT. It assumes the user has read this document and is familiar with computers, Windows operating systems, SPOT, and the drycleaning process. This guide should be used as a reference only and not for training. Note that **PIN** *access is configurable for most of the procedures discussed in this chapter. Some procedures might not indicate that* **PIN** *access is required, however, a change in security configuration options might affect this requirement, adding* **PIN** *entry step.*

Order Production

QUICK

Quick Receiving an Order

01 Select **Quick [1]** from **HP** view—>Security dialog
02 Enter clerk **PIN**—>**CL** view
03 Select or add new customer—>Quick view
04 Select Department
05 Select item quantity
06 Repeat steps 4–5 for all items
07 Select the **Finish [F12]** button—>claim checks print, **HP** view

Change Order Promised Date for Current Item

01 The current **VI** item remains selected until next Department
02 Select new date in Production Forecaster

Change Order Promised Date for any Item

01 Select **VI** item for date change
02 Select the new date in the Production Forecaster
03 Repeat steps 1–2 for other items

Applying an Order-level Coupon

01 Select **Coupon** button—>Order View, Coupon tab displayed
02 Select predefined coupon or enter manual coupon
03 Select **Apply [F12]** to add coupon and return to Quick
(NOTE: Since Quicks are not priced, coupons are applied at Detail.)

Adding an Order-level Comment

01 Select **Comment** button—>Order View, Comment tab displayed
02 Select predefined comment or enter manual comment
03 Select **Apply [F12]** to add comment and return to Quick

DETAIL

Detailing an Order with no Prior Quick

If the selected customer has orders ready for pickup, a prompt will occur at the end

01 Choose **Detail [2]** from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>**CL** view
03 Select or add new customer—>Item Detail view
04 Select Department
05 Select Category
06 Select Item—>Modifier Detail view
07 Select Color(s), Pattern, Brand, Fabric
08 Select Upcharge(s)
09 Select Quantity if other than 1 (always defaults to 1)
10 Select **Next Item** button and repeat steps 4–9 for additional items
11 Select the **Finish [F12]** button—>invoice prints, **HP** view

(NOTE: Under configuration control, an order pickup dialog can occur at the end of this process if the customer has orders ready for pickup.)

Detailing an Order from a Quick

01 Choose **Detail [2]** from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>**CL** view
03 Scan Quick invoice number—>Item Detail view
04 Select Department
05 Select Category
06 Select Item—>Modifier Detail view
07 Select Color(s), Pattern, Brand, Fabric
08 Select Upcharge(s)
09 Select Quantity if other than 1 (always defaults to 1)
10 Select **Next Item** button and repeat steps 4–9 for additional items
11 Select the **Finish [F12]** button—>invoice prints, **HP** view

(NOTE: Under configuration control, an order pickup dialog can occur at the end of this process if the customer has orders ready for pickup.)

Toggling Between Item/Modifier Views

01 Select **Toggle** button from Modifier view to display Item view
02 Select **Toggle** button from Item view to display Modifier view

Placing an Order on Hold

01 Select the **Hold** button to suspend detailing—>**HP** view
02 Use any other system function, such as order pickup
03 Select the **HP Detail-Hold [2]** button to resume detailing

(NOTE: The Hold button is active only after one item is detailed.)

Prepaying an Order

01 Select the **Prepay** button to force payment—>Pickup view
02 Apply full or partial prepayment
03 Cash drawer opens, invoice prints with balance due—>**HP** view
(NOTE: Prepaid orders show zero balance, but remain active until sold.)

Item and Order Changes

In most cases, Item and Order change buttons preselect appropriate tabs within the Item View or Order View (see the Exception Handling chapter for details). During the detail process (before printing an invoice), certain task buttons operate directly on the order or item. For example, to delete an entered item in the **VI**, select the item, then press the **Delete** key.

RACK

Racking Orders to a Conveyor

01 Choose **Rack [3]** from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>Rack view
03 Select Conveyor racking function
04 Scan/Enter the order number—>Location field
05 Scan/Enter the conveyor location number—>Invoice field
06 Repeat steps 3–4 for all completed orders
07 Select the **Close [F12]** button—>**HP** view

Racking Orders to Automatic Location

01 Choose **Rack [3]** from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>Rack view
03 Select an Automatic racking function
04 Scan/Enter the order number—>Location field
05 Repeat step 4 for all completed orders
06 Select the **Close [F12]** button—>**HP** view

Racking Orders with SPOTscan

01 Choose **Rack [3]** from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>Rack view
03 Use SPOTscan in the Rack mode and scan all orders
04 Connect SPOTscan to docking station
05 Select **SPOTscan Sync** button—>Sync dialog
06 Select **OK** to begin download
07 Press the **Upload** button on SPOTscan
08 Select the **Close [F12]** button—>**HP** view

PICKUP

Picking Up Orders by Cash/Check/CC

01 Choose **Pickup** [4] from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>**CL** view
03 Select customer or Scan claim check—>Pickup view, Ready orders marked
04 Modify orders to be picked up with **Mark/Unmark** if necessary
05 Select Tender Type—>Tender Entry
06 Enter the amount received and check number
07 Select the **Finish** [F12] button—>cash drawer opens, **HP** view

(NOTE: The cash drawer can be set to open only for cash transactions, checks and ***CC*** *receipts are placed in the cash drawer through front slots.)*

Picking Up Orders by CCOF

01 Choose **Pickup** [4] from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>**CL** view
03 Select customer or Scan claim check—>Pickup view, Ready orders marked
04 Modify orders to be picked up with **Mark/Unmark** if necessary
05 CC button automatically highlighted with red card type
06 Select the **Finish** [F12] button—>**CCOF** view, **HP** view

Picking Up Orders on A/R

01 Choose **Pickup** [4] from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>**CL** view
03 Select customer or Scan claim check—>Pickup view, Ready orders marked
04 Modify orders to be picked up with **Mark/Unmark** if necessary
05 A/R button automatically highlighted in red
06 Select the **Finish** [F12] button—>orders post, **HP** view

QUOTE

Quote Only

01 Choose **Quote [5]** from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>Item Detail view
03 Select Department
04 Select Category
05 Select Item—>Modifier Detail view
06 Select Color(s), Pattern, Brand, Fabric
07 Select Upcharge(s)
08 Select Quantity if other than 1 (always defaults to 1)
09 Select **Next Item** button and repeat steps 3–8 for additional items
10 Select the **Finish [F12]** button
11 Select **No [Esc]** at the **Create Invoice?** dialog—>**HP** view

Quote to New Order

01 Choose **Quote [5]** from the **HP** view—>Security dialog
02 Enter clerk **PIN**—>Item Detail view
03 Select Department
04 Select Category
05 Select Item—>Modifier Detail view
06 Select Color(s), Pattern, Brand, Fabric
07 Select Upcharge(s)
08 Select Quantity if other than 1 (always defaults to 1)
09 Select **Next Item** button and repeat steps 3–8 for additional items
10 Select the **Finish [F12]** button
11 Select **Yes [F12]** at the **Create Invoice?** dialog—>**CL** view
12 Select or add new customer—>**HP** view

Exception Handling

ITEM RELATED EXCEPTIONS

Item-level changes are accessed via **VI** Item View [F6] button—active only after selecting the item to be changed. Direct access from Detail function buttons automatically preselects the appropriate Item View tab. The following descriptions assume the Item View has been selected and displaying the General tab. Upon entry of the Item View, all tabs contain currently selected item-level data. **PIN** access is not shown, but in most cases, configuration can be set to require it. Press the OK [F12] button to exit the Item View and update changes or the Cancel [Esc] button to exit with no changes.

Change Department, Category, or Item

01 Select Department, Category, or Item button—>List dialog
02 Select a new choice from the list
03 Button changes to the new choice

Change Quantity

01 Select a new quantity using the [1]–[10+] buttons
02 Extended Price field changes reflecting new quantity

Change Promised Date or Time

01 Select the Change Promised Date Task button—>Calendar view
02 Select new time using [-] and [+] buttons
03 Select new date by pressing day button—>General tab

Void Single Item, Single Quantity

01 Select Item in **VI**—>Item highlighted yellow
02 Select the Void Task button—>Void dialog
03 Select Item [F12] button to void item—>Void Reason list
04 Select Void Reason from list—>"Void" watermark appears on **VI**
05 Select OK [F12] to save void change—>Invoice print dialog
06 Select Yes [F12] to reprint voided invoice

(NOTE: Voiding the only item on an order effectively voids the entire order.)

Void Single Item, Multiple Quantity

01 Select Item in **VI**—>Item highlighted yellow
02 Select the Void Task button—>Void dialog
03 Select Item [F12] button to void item—>Void Reason list
04 Select Void Reason from list—>Void quantity dialog
05 Enter void Quantity—>"Void" watermark appears on **VI**
06 Select OK [F12] to save void change—>Invoice print dialog
07 Select Yes [F12] to reprint voided invoice

Change Item Price

01 Select **Change Item Price** button—>Change Price dialog
02 Highlight price field, enter new price
03 Select **Finish [F12]** to change—>new price shows in **VI**

Change/Add Descriptors

01 Select Descriptors tab
02 Select Descriptor from the Descriptor Type list
03 Select new Descriptor
04 Repeat steps 2–3 for other descriptor types
(NOTE: Multiple color descriptors can be selected.)

Change/Add Upcharges

01 Select Upcharges tab
02 Select new Upcharge (non-list)
03 Select Upcharge (list)—> Upcharge List view
04 Select Upcharge type from list
(NOTE: Multiple upcharges can be selected.)

Change/Add Adjustments

01 Select Adjustments tab
02 Select new predefined Adjustment
03 Select **Manual Adjustment** button—>Manual Adjustment view
04 Enter Adjustment text
05 Enter amount
06 Select % to change to a percentage

Change/Add Alterations

01 Select Alterations tab
02 Select Alteration
(NOTE: Adding an alteration to an item does not affect piece count.)

Change/Add Comments

01 Select Comments tab
02 Select a predefined Comment
03 Enter a Manual Comment

ORDER RELATED EXCEPTIONS

Order-level changes are accessed via **VI Order View [F7]** button (selectively available from various areas in the system). Direct access from Detail function buttons automatically preselects the appropriate Order View tab. The following descriptions assume the Order View is selected and displaying the General tab. Upon entry of the Order View, all tabs contain currently selected order-level data. **PIN** access is not shown, but in most cases, configuration can be set to require it. Press the **OK [F12]** button to exit the Order View and update changes or the **Cancel [Esc]** button to exit with no changes.

Reprint an Invoice

01 Select the **Reprint Invoice [F9]** Task button

Reprint Demand Tags

01 Select the **Preprint Tags** Task button

(NOTE: Active only for demand printed tag configuration.)

Void an Order

01 Select **Void** Task button—>Void Reason list
02 Select Void Reason, press **OK**—>"Void" watermark appears on **VI**
03 Select **OK [F12]** to save voided invoice—>Void print dialog
04 Select **Yes [F12]** to reprint invoice

Redo an Order

01 Select Item in **VI**—>Item highlighted yellow
02 Select **Redo** Task button—>Redo Verification dialog
03 Select **Yes [F12]** to confirm redo action—>Redo Reason list
04 Select Redo Reason
05 Select **OK [F12]** button to complete redo

Make Payment Against an Order

01 Select **Make Payment** Task button—>Make Payment dialog
02 Select Tender Type
03 Enter amount received
04 Select **Finish [F12]** button—>General tab

Assign Order to a Different Customer

01 Select **Reassign Customer** Task button—>**CL** view
02 Select customer for order reassignment
03 Select **Finish [F12]** button
04 Select **Yes [F12]** button to confirm reassignment—>General tab

Split Items to a New Invoice

01 Select **Split** Task button—>Split Invoice dialog
02 Select item to split from current invoice
03 Select **Split>>** button to split item to new invoice
04 Select item to restore to original invoice
05 Select **<<Restore** button to restore split item
06 Select **OK [F12]** button to complete split—>invoices printed
(NOTE: Restore will not work after a split has occurred.)

View Associated Orders in Original Visit

The collection of orders automatically split into several invoices as the result of the Intelligent Invoice Splitting function is called a visit.

01 Select **Visit History** Task button to view visit orders—>Search view
02 Select **Close [F12]** to exit Search view—>General tab

Change Order Promised Date

01 Select the **Change Promised Date** Task button—>Calendar view
02 Select new time using **[-]** and **[+]** buttons
03 Select new date by pressing day button—>General tab

Customer Maintenance

ADDING A NEW CUSTOMER

From Customer Maintenance Function

01 Select **Menu [F3]** button—>Menu view
02 Select **Customer Maintenance** button—>Security dialog
03 Enter clerk **PIN**—>**CL** view
04 Select **Add a New Customer** button—>**CV** view
05 Enter related customer information (* fields required)
06 Select **OK [F12]** to add new customer—>Menu view

From Order Processing Step

01 Select any order processing button—>Security dialog
02 Enter clerk **PIN**—>**CL** view
03 Select **Add a New Customer** button—>**CV** view
04 Enter related customer information (* fields required)
05 Select **OK [F12]** to add new customer—>next view in the step
06 Select **Cancel [Esc]** to exit—>**HP** view

EDITING AN EXISTING CUSTOMER

From Customer Maintenance Menu

01 Select **Menu [F3]** button—>Menu view
02 Select **Customer Maintenance** button—>Security dialog
03 Enter clerk **PIN**—>**CL** view
04 Highlight a customer in the list
05 Select the "OK" button—>**CV** view
06 Change customer information where necessary
07 Select **OK [F12]** to save changes—>Menu view

From Order Processing Step

01 Select any order processing button—>**CL** view
02 Highlight a customer in the list
03 Select **Customer Summary [F8]** button displaying name—>**CV** view
04 Change customer information where necessary
05 Select **[F12]** to save changes and continue to next step
06 Select **Cancel [Esc]** to exit—>**HP** view

Activate for Route Delivery

01 Select **HP Delivery** tab—>Route view
02 Select Route for customer addition—>Stop list
03 Select **Insert Stop** button—>**CL** view
04 Select customer to be added to selected route—>Route Stop view
05 Enter route stop number and associated information
06 Select **OK [F12]** button to add customer—> Route view

Activate for A/R charging

01 Select **CV** A/R tab
02 Select Account Type as *Master* or *Sub*
03 Select a Billing Group
04 Use default Account # or select new with **Copy from ID** button
05 Enter an Account Limit if desired (0.00 is unlimited amount)
06 Select **OK [F12]** button to activate

Activate for CCOF

01 Select the **CV** General tab
02 Enter or scan the credit card number and expiration date
03 Select when credit card is used for payment at Usage field

Hardware and Accessories

Cash Drawers

Barcode Readers

Touch Screens

Printers

Credit Card Readers

SPOT Business Systems offers a wide variety of complete business computer systems and peripherals, all guaranteed to operate with SPOT's specialized functions. There are many different types of peripherals on the market to choose from. We have tested many such peripherals and found the combinations that work the best in the drycleaning environment with SPOT. The next pages illustrate many of the accessories we offer. Note that all peripherals are shipped in Black (Graphite) color unless otherwise specified.

Thermal Printer

This versatile printer is small, fast, quiet and reliable. It can be used to print quick tickets, invoices, pickup receipts, **CC** slips, pickup lists, route bag tags, and cash drawer closeout summaries, all with store logo.

Tag Printer

Printing tags on demand is fast and easy using this printer. Using standard wet-strength, multi-color perma-fiber blank tag paper, SPOT prints garment tags with or without an item tracking barcode number.

Report Printers

SPOT supports report printing to both inkjet and laser graphic printers. This high-quality HP printer is fast and reliable for all your report and statement needs.

Corded BCR

Typically used at the counter when cord distance is not an issue, this affordable and stylish laser scanner provides an amazing scan distance of 6"–10" from the barcode. A 28' extension cable is also available.

Cordless BCR

When a corded scanner just won't work, this portable RF scanner fills the bill. It has a range of up to 50'. The docking base also acts as a battery charger. This unit can run real-time at the counter as well.

Flat Panel Display

This optional non-touch screen display can be used in place of a standard CRT monitor for long-life, high-style, and low counter space consumption. A mouse must be used in conjunction with this display.

Counter-Top Touch Screen

This highly reliable and low-glare monitor combines flat-panel reliability with an ease-of-use feel to provide one of the most fluid SPOT navigation tools ever. This is an adjustable counter-top design.

Credit Card Reader

This very small **CC** reader can be mounted almost anywhere, keyboard top, monitor, or counter. It is specially designed to work with the **CC** payment processing feature within SPOT.

Cash Drawer

Our intelligent cash drawer can be connected to SPOT in a variety of ways depending on level of required cash control. Front slots provide security entry for **CC** slips, check, and receipts.

SPOTscan

This industrial intelligent laser scanner is designed to handle racking, physical inventory, Process Step tracking, and inventory backup. It comes with a download docking cradle and charger.

Display Poles

Optional display poles provide visual counter transaction customer feedback minimizing employee theft directly from the customer. They are attached directly to any counter computer with a spare serial port.

High Capacity Backup

This 160 Gbyte hard drive backup device will protect your valuable database files. Available with a USB interface, this drive can be configured to run automatic nightly backups.

Glossary of Terms

Alert—The result of an order production problem detected by SPOT's automatic order process management system.

A/R—An acronym for Accounts Receivable, this feature is common in most General Ledger accounting systems. It handles in-house billing accounts with the same features found in larger GL systems.

Barcode—Made up of a series of vertical bars and spaced such that unique characters are encoded. Barcodes require the use of a special decoder called a barcode reader.

CCOF—Acronym for Credit Card On File. It refers to a system-memorized customer Credit Card (**CC**) number to be used for automatic transactions, eliminating the need for a signature at each transaction.

Demand Tag—Used to identify a garment for reassembly after the cleaning process, demand tags are printed under computer control. They contain information from the system database such as name, item type, due date...information not found on preprinted tag stock.

Detail—The process of pricing and describing an order, sometimes referred to as *Mark-in*. The result of the detail process is an invoice containing a complete description of all items, priced for order pickup.

Dialog—A pop-up window containing information or requesting input. Dialogs typically handle exceptions during navigation.

Dropdown—A small window containing a down arrow. When clicked, the Down Arrow button exposes a list of choices, only one of which can be selected.

Filter—Used to allow selected information to pass, narrowing the amount of resulting data.

Home Page—The selection and status command center of SPOT, all system activity begins and ends here.

HSL—Heat Seal Labels contain unique barcode numbers which, when attached to a garment, effectively serializes it for tracking and automation purposes. They require heat to activate adhesive for permanent garment attachment.

Invoice—An invoice contains priced and described order detail information, sometimes called the *Mark-in* process. An invoice differs from a snap ticket-type form in that it is derived from continuous roll paper with invoice numbers assigned automatically by the computer.

Manifest—A document given to a route driver which provides driving instructions to each customer site for pickup and delivery. Also contains order information and amounts to be collected.

Modifier—During the Detail process, modifiers are used to describe items in the order. A modifier can be a color, pattern, brand, or fabric.

MSR—An acronym for Magnetic Swipe Reader, this input device is usually connected to each counter workstation. When a **CC** is swiped, information contained on the magnetic stripe is sent to the computer.

PIN—Stands for Personal Identification Number. Each user has a unique **PIN** for access to system functions.

Rack—The place where a cleaned garment is placed awaiting customer pickup. Rack usually refers to a conveyor location or slick rail position.

Reconciliation—The act of comparing the actual amount in a cash drawer to the total as computed by SPOT.

ScanTrac—The process of tracking items within SPOT using HSL barcoded labels.

SPOTscan—An intelligent PDA with an integrated barcode laser scanner. It is designed to interface to SPOT and contains special software to perform off-line tasks such as Physical Inventory and Racking.

Tab View—A Windows view that has multiple selection tabs. Pressing a tab selects that unique view within the group of tabs.

Tender Type—Refers to the form of payment during the order pickup process. Tender can be in the form of cash, check, **CC**, or **A/R**.

Upcharge—A cost for a special service to a garment. Usually an upcharge is added to the cost of base price of an Item; however, it can be a negative adjustment as well.

Visual Invoice (VI)—A rendering of a actual order invoice along with controlled access to order and customer information. The **VI** provides continual feedback of the status of an order in a variety of scenarios.

Watermark—Lightly colored text (usually 5% screen density) that appears behind normal text used to draw attention to or note a change.

Workstation—A computer that is part of a network of several computers operating from a single consolidated database. Employees use workstations to perform automation tasks at a counter, drive-up window, mark-in table, etc.